Staff User's Guide

Version 2.0

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Document released: September 2008

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Part 1

Introduction

Part 1 contains the following:

- Section **1: Introducing Verde** on page **17**

1

Introducing Verde

This section includes:

- **The Verde KnowledgeBase – Central, Global and Local** on page **17**
- **Verde Modules** on page **18**
- **Additional Verde Features** on page **20**

Verde is an Electronic Resource Management system designed to facilitate a library's management of the information and workflows necessary to evaluate, acquire, and maintain e-resources in accordance with the library's business and license terms.

The Verde KnowledgeBase – Central, Global and Local

Ex Libris maintains a Central KnowledgeBase (CKB) that contains a broad range of the electronic resources available in the global e-market. The CKB includes e-interfaces, e-standalones, e-packages, and e-constituents, as well as their linked work records. It is continually updated to reflect changes in the global e-market.

Your Verde installation includes a Global KnowledgeBase (GKB) that is a copy of the CKB. The GKB facilitates collection management decisions by helping you locate resources and serves as the basis for the creation of the local Verde KnowledgeBase (LKB) for your Verde instance. Through regular updates from the CKB, known as **KB Updates**, the GKB also provides you with information about new resources.

When Verde is first installed, the LKB is created from the GKB. As you begin working with the Verde system, the LKB is localized. Specific e-products are activated and attribute records (such as local acquisition, license, and access records) are linked to the activated e-products. New e-products and work records, known as locally created e-products and work records, may also be

created in the LKB. Periodically, through the KB Updates, changes in the CKB are transferred via the GKB to the LKB.

Verde Modules

Verde has four modules:

- Verde Tasks
- KB Manager
- KB Tools
- Admin (displayed only for user with administrator permissions)

By default, the KB Manager module is displayed when you log in to Verde.

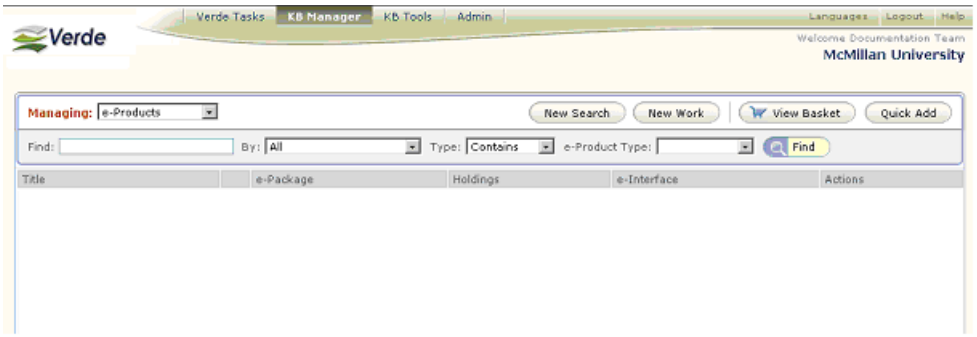

Figure 1: KB Manager

After logging in to Verde, you can do the following:

- Review basic information about your Verde installation, such as the operating system on which Verde is being run, the Verde server name, and the Verde version, service pack version, KnowledgeBase level, and Oracle version that is installed. All of this information appears in a pop-up

window that opens when you click the Verde logo in the upper-left corner of the KB Manager module.

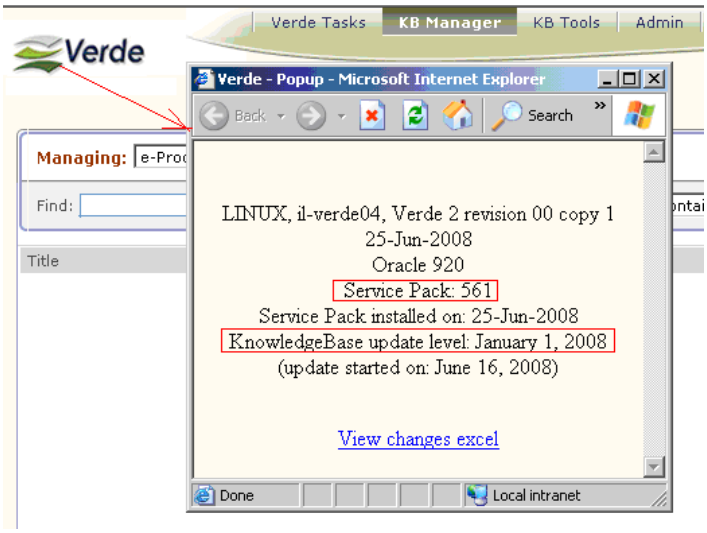

Figure 2: About Verde

- Review the Verde release notes by clicking the **View Changes Excel** link in the Verde information pop-up window.
- Change the language in which the Verde user interface is displayed by clicking **Languages** in the top right corner

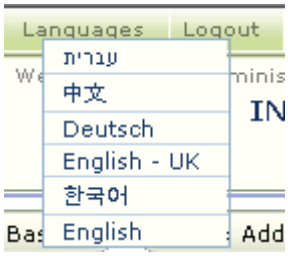

Figure 3: Language Menu

- View your user name and the instance in which you are currently working (in the top right corner)
- Navigate from module to module by clicking the module tabs in the menu bar

You can perform the following tasks in each module:

- **Verde Tasks** – View assigned and unassigned tasks that were generated by the Verde workflow engine. For information on the Verde Tasks module, see **Verde Tasks** on page **381**.
- **KB Manager** – Manage e-products and their attributes, libraries, and organizations. For information on the KB Manager module, see **Introducing the KB Manager Module** on page **23**.
- **KB Tools** – Schedule and run reports, tasks, and loaders, as well as view the output of reports, tasks, and data loads. For information on the KB Tools module, see **Introducing the KB Tools Module** on page **177**.
- **Admin** (only if you have administrative permissions) – Perform administrative functions such as managing Verde users and setting default values for relevant Verde entities. For information on the Admin module, see **Introducing the Admin Module** on page **385**.

Additional Verde Features

Verde supports both single-instance environments as well multi-instance, or **shared consortium**, environments. In a shared consortium environment, one of the Verde instances serves as the central instance, while the other instances function as member instances. For information on working in a shared consortium environment, see **The Shared Consortium Environment** on page **441**.

In addition, you can use Verde as a single point of maintenance for e-resource data that is shared by your library's suite of automation tools. For information on working with Verde in conjunction with SFX, ALEPH, or Voyager, see **Introducing Verde Interoperability** on page **475**.

Part 2

KB Manager Module

Part 2 contains the following:

- Section 2: Introducing the KB Manager Module on page 23
- Section 3: Overview of e-Product Management on page 25
- Section 4: Work Records on page 35
- Section 5: e-Product Lists on page 41
- Section 6: e-Product Attribute Records on page 47
- Section 7: e-Product Records on page 59
- Section 8: Selection Workflows on page 73
- Section 9: Acquisition Records on page 85
- Section 10: License Records on page 103
- Section 11: Access Records on page 119
- Section 12: Admin Records on page 129
- Section 13: Trial Records on page 143
- Section 14: Cost Records on page 151
- Section 15: Usage Records on page 155
- Section 16: Workflows on page 159
- Section 17: Organization Management on page 163
- Section 18: Library Management on page 169

2

Introducing the KB Manager Module

The KB Manager module supports the management of key Verde entities, such as the e-product and its attributes, as well as related libraries and organizations.

By default, when you enter the KB Manager module, the e-product management area is displayed. To view the library or organization management area, select **Libraries** or **Organizations**, respectively, from the **Managing** drop-down list.

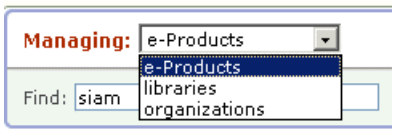

Figure 4: Managing Drop-Down List

For information about the e-product management area, see **Overview of e-Product Management** on page **25**.

For information about the organization management area, see **Organization Management** on page **163**.

For information about the library management area, see **Library Management** on page **169**.

3

Overview of e-Product Management

This section includes:

- **e-Product Types** on page **25**
- **Getting Started in the e-Product Management Area** on page **27**

An e-product is the main type of entity managed by Verde. This section describes the five types of e-products that exist within the Verde system and explains how to begin working in the e-product management area.

e-Product Types

The following types of e-products exist within the Verde system:

- e-interface
- e-package
- e-constituent
- e-standalone
- e-print

The above e-product types are described in this section.

e-Interface

The e-interface is the means by which electronic resources are accessed. *EBSCOhost* and *Highwire Press* are examples of e-interfaces. e-Interfaces are included as separate records in Verde because they may be acquired and licensed independently of the electronic resources that are accessed via the interface.

e-Package

An e-package is a grouping of one or more electronic e-products (known as **e-constituents** in Verde). Examples of e-packages include *JSTOR Arts and Sciences I*, *Elsevier ScienceDirect*, and *EBSCO Academic Search Premier*. There are two distinct types of e-packages:

- **Aggregator Packages**

  Aggregator packages are inclusive. When an aggregator package is selected in Verde, all its e-constituents are automatically included in the package. Acquisitions and licensing are performed only at the level of the package.

  Examples of aggregator packages include: *EBSCO's Academic Search Premier* or *Academic Search Elite*, *ProQuest's ABI Inform* with full text, and *JSTOR Arts and Sciences I*.

- **Selective Packages**

  Selective packages contain multiple e-constituents from which a library can select.

  Examples of selective packages include: *Elsevier's ScienceDirect*, *Wiley's InterScience*, and *Oxford University Press via Highwire*.

A package can be linked to one e-interface only.

e-Constituent

An e-constituent is an electronic resource or e-product that is part of a package. The most common example of an e-constituent is a single electronic journal that is part of a package. For example, the journal *Brain Research* is an e-constituent in the *ScienceDirect* e-package. However, e-constituents can also be e-journals, e-books, or electronic products of other types that are sold by groupings (or packages).

An e-constituent can be linked to only one package. It cannot be linked to another e-constituent or directly to an e-interface. As a result, there must be a separate e-constituent record in every package in which an electronic journal is offered. For example, in addition to being an e-constituent in *EBSCOhost Electronic Journals Service*, the *Journal of Early Modern History* also has an e-constituent record in the e-packages *SwetsWise* and *Ingenta Select*.

e-Standalone

An e-standalone is an individual electronic resource that is linked directly to an e-interface. The most common examples of e-standalone resources are Abstract and Indexing databases. However, electronic journals that are not sold via a package or e-books sold separately can also be represented as e-standalone

records. Examples of e-standalone resources are *Medline* and *D-Lib*. An e-standalone resource is linked to an e-interface and has no e-constituents.

e-Print

An e-print represents the print version of an electronic resource that is often relevant to the electronic version for acquisition and licensing purposes. An e-print record has different fields than true electronic e-products, but in other ways is similar to an e-product.

e-Print records can be created manually or imported using a batch program. They are used in Verde for information and reporting purposes only. e-Print records are not linked to any other e-products and are associated with work records only (for information on work records, see **About Work Records** on page **35**).

The following diagram illustrates the relationship between e-interface, e-standalone, e-package, and e-constituent e-products:

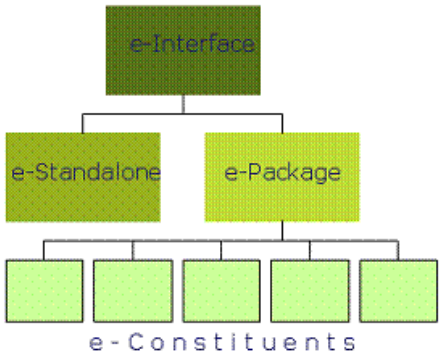

Figure 5: Relationships Between e-Products

e-Interface, e-standalone, e-package, and e-constituent e-products are supplied by Ex Libris as part of the Verde KnowledgeBase. Ex Libris recommends that a local e-product record be created only when a KnowledgeBase record does not exist for the particular e-resource. Existing e-product records contain references to records in other Ex Libris products and are updated regularly by Ex Libris via KnowledgeBase updates.

Getting Started in the e-Product Management Area

This section describes how to search for e-products in the e-product management area, how to view search results, and how to add e-products to your basket.

Searching for e-Products

To begin working with e-products within Verde, you must perform a search and retrieve a set of one or more e-products.

To search for e-products:

1. In the e-product management area of the KB Manager module, in the **Find** box, enter one or more search terms. Note that Verde supports the following Boolean operators: **AND, OR, NOT**. If one or more terms are entered without a Boolean operator, Verde performs a phrase search. For each term, the ***** and **?** regular expressions are supported.
2. From the **By** drop-down list, select an index to search. Alternatively, you can select **All** to search an index that contains all fields in the work record (for information about work records, see**About Work Records** on page **35**) and the following fields from the e-product and its attribute records: **e-Product status**, **Selection status**, **e-Product type**, **e-Package type**, **Acquisition status**, and **License status**. For more information about indexes, see **Indexing** on page **509**.
3. From the **Type** drop-down list, select one of the following search types:
   - **Contains** – A keyword search for one or more search terms that appear anywhere in a record.
   - **Exact Match** – A search that treats the search term as a phrase and looks for an exact match for the term being searched.
   - **Starts With** – A search for records in which the search term appears at the beginning of the field. It is most useful for searching for a record title.
4. From the **e-Product Type** drop-down list, select the default, **All**, to search within all the e-product types, or select one of the five e-product types to search within the selected e-product type only.
5. If you are working in a single-instance environment, click one of the following options to define the scope of your search.
   - **Find Local** – These searches are performed in the local KnowledgeBase and retrieve matching records that have been created locally, or records from the Global KnowledgeBase that have been localized (by adding a local selection status and/or an e-product status, or by adding an attribute record).
   - **Find All** – These searches are performed in the entire KnowledgeBase and retrieve matching records regardless of their local status.
6. If you are working in a multi-instance, non-shared environment, right-click the **Find** button and in the pop-up window, choose the instances that you want to search. Select **Search KB** to include e-products from the

KnowledgeBase that are not active or local in your search. Click **Find** to activate the search.

If you are working in a multi-instance, shared environment, see **Search, Display,and Navigation in a Shared Consortium Environment** on page **459** for information on the available search and display options.

Viewing Search Results

The e-products and work records (for information on work records, see **About Work Records** on page **35**) that meet the criteria of your search are displayed in the e-product management area.

Above the table, a summary line is displayed, indicating the search term, the total number of e-product/work records retrieved by the search, and, if you are working in a multi-instance non-shared environment, the instances that were searched.

Figure 6: Search Results – Single-Instance Environment

Figure 7: Search Results – Multi-Instance, Non-Shared Environment

The columns displayed in the table differ depending on whether you are working in a single-instance environment or a multi-instance, non-shared environment.

The following table describes the columns displayed.

Table 1. Table Columns

Name	Description
Title	The work/e-product record title found as a result of the search. Note that the search argument may not be visible. It may be in a record field that is not displayed.
e-Product Type	Displays the relevant e-product type icon.
e-Package	If the search result is an e-constituent, this column displays the package name that contains this e-constituent.
Holdings (multi-instance environments only)	Displays the searched instances in which the e-product is local. It includes the selection status and the e-product status for each searched instance in which the e-product is active.

Table 1. Table Columns

Name	Description
e-Interface	If the search result is an e-constituent, e-package, or e-standalone, this column displays the e-interface to which the e-product belongs.
Status (single-instance environments only)	The e-product's status field from the e-product. This field provides information about the implementation status of the e-product.
Selection Status (single-instance environments only)	The e-product's selection status field, which describes the stage of the e-product in the selection process.
Actions	Contains one of the following buttons: ■ The **Add to basket** button enables you to add an e-product to your basket. This button is always displayed. ■ The **Link to resource** button opens an SFX window which takes you to the home page of the journal as it is stored by SFX. This button is displayed only if the resource is active. ■ The **New** button is displayed for each work record. It is always possible to add a new e-product to an existing work record.

The following table describes the icon buttons and hypertext links used within the search results display.

Table 2. Icon Buttons/Hypertext Links

Icon Buttons/Hypertext Link	Description
	Displays the full work record
	Indicates that the e-product is an e-constituent. Displays the full e-product.
	Indicates that the e-product is a selective e-package. Displays the full e-product.

Table 2. Icon Buttons/Hypertext Links

Icon Buttons/Hypertext Link	Description
	Indicates that the e-product is an aggregator e-package. Displays the full e-product.
<Package name>	Displays the full e-product package
	Indicates that the e-product is an e-interface. Displays the full e-product.
<Interface name>	Displays the full e-product interface
	Indicates that the e-product is an e-standalone. Displays the full e-product.
	Indicates that the e-product is an e-print. Displays the full e-product.
	Displays a list of the e-constituents that belong to the selective e-package. For details on this list, see **e-Package List** on page **43**.
	Displays a list of the e-constituents that belong to the aggregator e-package. For details on this list, see **e-Package List** on page **43**.
	Display a list of e-packages and/or e-standalones that belong to the e-interface. For details on this list, see **e-Interface List** on page **41**.
	Indicates that the e-product is active in the local KnowledgeBase

Search results are sorted alphabetically by the title of the work record. If a work record has more than one linked e-product record, these records are sub-sorted alphabetically by e-package and e-interface name.

If the e-products associated with a single work record do not fit on the screen, **next…** appears in the last line of the search result table.

Figure 8: Search Results – Browse to Next Page

Use the single and double arrows ⏮ ◀ ▶ ⏭ that appear at the bottom of the screen to navigate through the search results. The single backward and forward arrows navigate backward and forward by a single screen, while the double arrows navigate to the beginning or end of the results list.

The following four buttons appear above the search boxes:

Figure 9: Search Results – Four Buttons

- **New Search –** Clears the current search results and navigation crumbs.
- **New Work –** Opens a new work record. For details on defining new work records, see **Adding New Work Records** on page **36**.
- **View Basket** – Displays the e-products that are in your basket. For details, see **Viewing Your Basket** on page **33**.
- **Quick Add –** Opens a wizard that enables you to add a new e-package or e-standalone. For details on this wizard, see **The Quick Add Wizard** on page **64**.

Working with Navigation Crumbs

When you perform a new search, a navigation crumb is created for the search. As you select work and e-product records, navigation crumbs are created for each record that you view. The navigation crumbs are displayed at the top of each screen that you view within the KB Manager module. You use these crumbs to navigate back to previous screens.

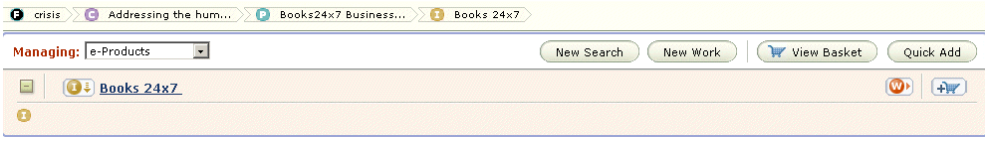

Figure 10: Search Results – Navigate to Previous Screen

The most recent search can be retrieved by selecting the navigation crumb that contains the Find icon . This search crumb is displayed as soon as a search is performed and continues to be displayed until a new search is performed.

Up to five additional crumbs are created—one for each of the five e-product or work records that are accessed. When a sixth e-product or work record is accessed, a new crumb is created and overwrites the first non-search crumb.

Note: Navigation crumbs are created for work records only when the these records are accessed from the search result table. If you select an e-product and then view the work record of this e-product, a navigation crumb is created for the e-product record itself, but not for its work record.

e-Product navigation crumbs display icons that correspond to the e-product types:

- **C** for e-constituent
- **S** for e-standalone
- **P** for e-package
- **I** for e-interface
- **Pr** for e-print
- **W** for work

When you select a navigation crumb, the e-product or work record opens to the screen that was last viewed. For example, if the screen that was last viewed is a license list, the e-product opens to the license list; if the screen that was last viewed is an acquisition list, the e-product opens to the acquisition list.

Viewing Your Basket

When you view the search result table, you can add records to your basket by clicking the **Add to basket** button . After you have added the record to your basket, the **Added to basket** button is displayed.

To view the items that you placed in your basket during the current session, click the **View Basket** button. The Basket Content window is displayed.

Figure 11: Basket Content

You can do the following in this window:

- Remove a record from the basket by clicking the **Remove from Basket** button to the left of the record.
- Remove all the records from the basket by clicking the **Remove all items from the basket** button in the column heading.
- Send an e-mail related to all the items in your basket by clicking the**Send e-mail** button at the top of the window.

4

Work Records

This section includes:

- **About Work Records** on page **35**
- **Adding New Work Records** on page **36**
- **Editing a Work Record** on page **38**
- **Deleting Work Records** on page **39**

About Work Records

A work record contains a brief bibliographic description of an e-product. Each e-product must have a corresponding work expression record, which contains standard bibliographic fields, such as title, imprint, ISSN, ISBN, and other key fields. In addition to these standard fields, it is possible to define up to ten local fields.

A single work record can, and often is, linked to multiple e-resources—for example, an e-journal that is offered through multiple providers. In this case, there is a single work record for the journal and multiple e-constituent records—one for each provider that offers this title. For example, the journal *Nature* is provided by both *EBSCOhost Academic Search Elite* and *Journals@Ovid*.

Work records are stored internally in MARC 21 XML format.

The Verde KnowledgeBase consists of predefined work records. It is recommended that you use these work records whenever possible and that you do not create your own work records unless they do not exist in the KnowledgeBase.

The advantages of KnowledgeBase work records over locally created records are twofold:

- The KnowledgeBase work records contain links to other Ex Libris products.

- The KnowledgeBase work records are maintained and regularly updated by Ex Libris as part of the KnowledgeBase update process.

Work records in the KnowledgeBase typically contain the following fields:

- Main title
- Abbreviated titles
- ISSN/eISSN or ISBN/eISBN
- Publisher
- Format
- Frequency
- Subject
- Continues/continued by
- SFX ID - This is the SFX Object ID

Adding New Work Records

You add new work records using both the new work and edit work screens. You can then associate an e-product type with the work record.

To add a new work record:

1 In the e-product management area of the KB Manager module, click the **New Work** button. A form screen with mandatory and optional fields for the work record opens.

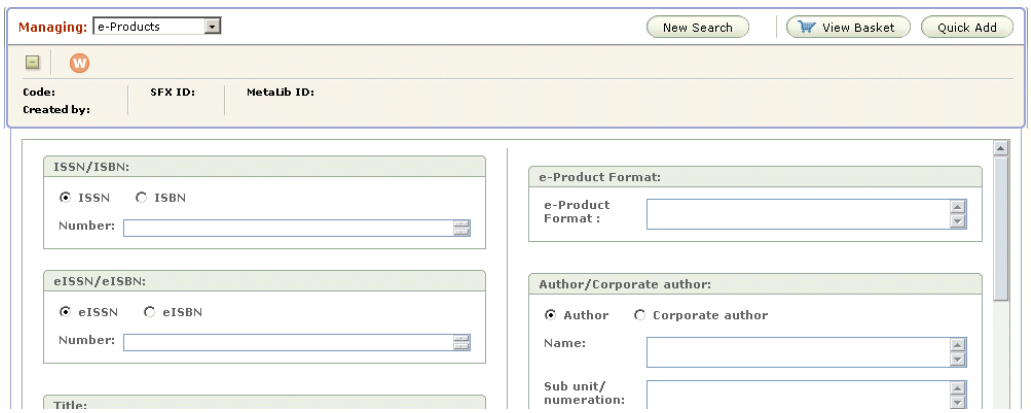

Figure 12: New Work – Form Screen

Note: This screen does not contain the full list of available fields. The full list of available fields can be viewed from the edit work screen only. This screen can be accessed only after you submit the work record.

2 Complete the provided fields. Note that the **Title** and **e-Product Type** fields are mandatory.

3 Click **Submit**. The new work record is saved and the edit work screen of the record opens, displaying the record title, the instance code, the associated SFX and MetaLib IDs, the user name of the user who created the work record, and the creation date of the record.

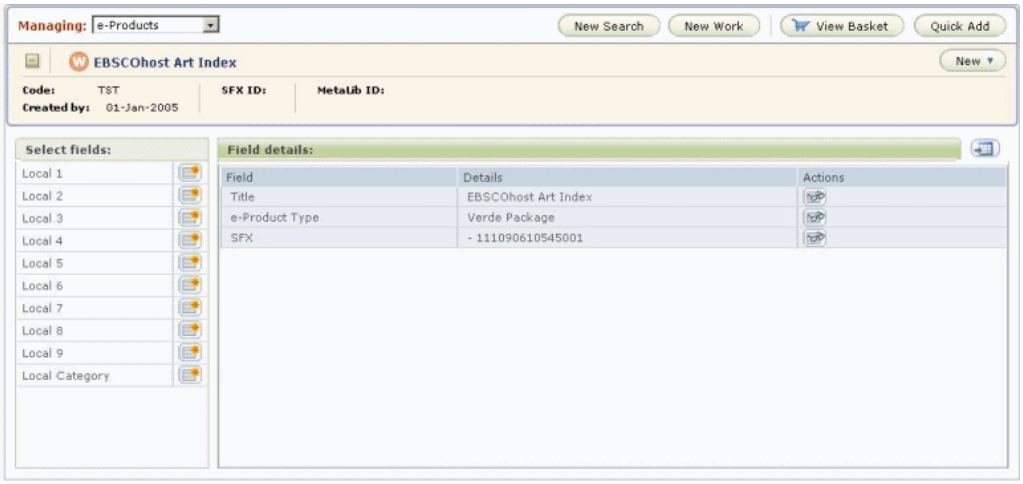

Figure 13: Edit Work Record

Note: The title bar can be collapsed and expanded using the **Collapse/Expand** buttons.

4 From the **Select Fields** list, select the fields that you want to add to the work record. The fields are added to the **Field Details** table on the right. Note that if a field does not appear in the Select Fields list, it is either already included in the work record or it is not available for use in the current record.

5 Click the **New** button in the top-right corner to select an e-product type that you want to associate with the new work record. For information on e-product types, see **e-Product Types** on page **25**.

Editing a Work Record

You can edit existing work records by adding new local fields, or by updating or deleting existing local fields.

Note: Records that have been derived from the KnowledgeBase are protected. Only local fields can be modified or added.

- To add a field, click the field's **Add** button.
- To edit an existing field, click the field's **Edit** button.
- To view an existing field, click the field's **View** button. Note that the field cannot be updated in view mode.
- To delete a field, click the field's **Delete** button. Note that only locally created fields and non-mandatory fields can be deleted.
- To set the non-filing indicator for the **Title** field, click the **Edit** button. The non-filing indicator is used to define the number of characters to be suppressed for filing. For example, to suppress the word **the**, you would enter **4** (that is, three spaces for the word **the** and one space for after the word). The suppressed characters are highlighted in yellow in the Title field's Details column, as shown below. .

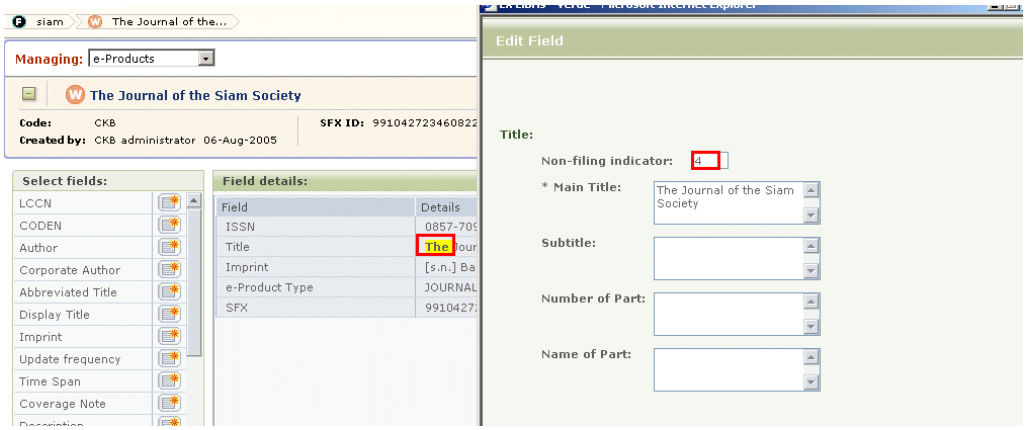

Figure 14: Edit Title Field

- To re-index the work record, click the **Index** button.

Deleting Work Records

You can delete work records that were created locally as long as the work records do not have associated e-products. If they do have associated e-products, first delete the associated e-product and then delete the work record. Work records that are part of the KnowledgeBase cannot be deleted. In consortia installations, locally created work records are automatically propagated to other instances.

5

e-Product Lists

This section includes:

- **e-Interface List** on page **41**
- **e-Package List** on page **43**

There are two types of e-product lists:

- e-Interface
- e-Package, which contains the following types of lists:
  - Selective
  - Aggregator

Note: The e-interface and e-package lists can be modified in multi-instance, shared consortium environment. For details, see **Viewing Merged Data in the e-Package and e-Interface Lists** on page **471**.

e-Interface List

The e-interface list displays the e-packages and/or e-standalone records offered through the interface. The e-products are sorted alphabetically by

title. The e-product status and selection status of each e-package or e-standalone is displayed in the list.

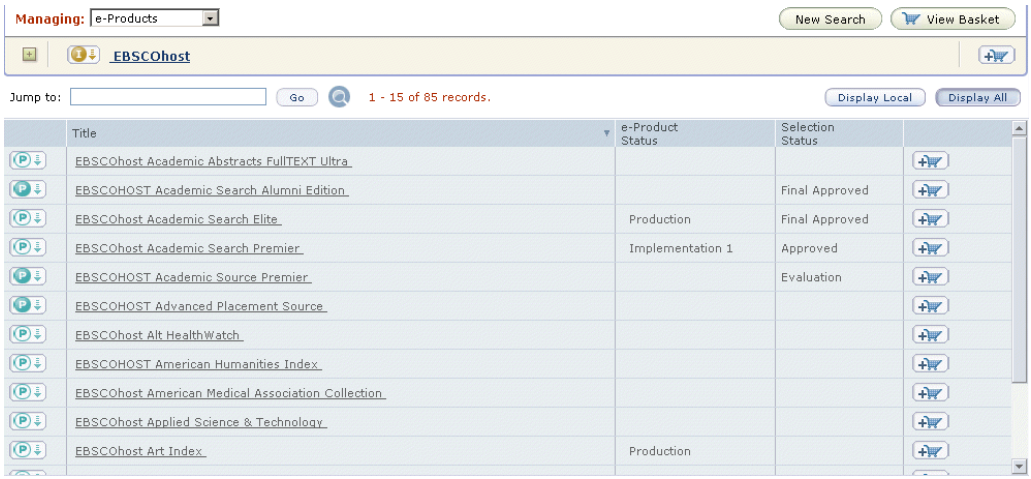

Figure 15: e-Interface List

The following options are available from this screen:

- Jump to another alphabetical point in the list.
- Display the local or display all the e-products linked to the e-interface
- Access an e-package list by clicking the icon in the relevant line in the first column.
- Access the e-product and its attribute records by clicking the underlined title in the second column.
- Add an e-product or the interface itself to your basket.

e-Package List

When you click one of the e-package buttons, a screen opens, displaying an alphabetical list of the titles that are linked to the e-package.

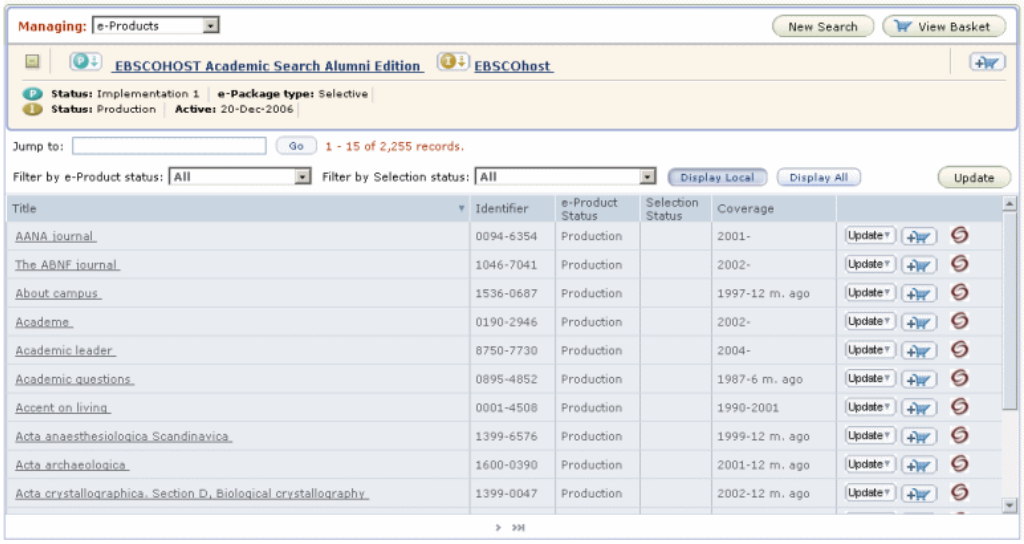

Figure 16: e-Package List

The following data is displayed for each title:

- Title
- Identifier (ISSN/eISSN or ISBN/eISBN)
- e-Product status
- Selection status
- Coverage – The coverage data that is displayed in the e-package list is taken from the local holdings, if available, and if not, from the global coverage.
- Actions
  - Update
  - Add to basket
  - Link to resource via SFX

The e-package list can be sorted alphabetically by title or by identifier. The blue arrow in the Title or Identifier header indicates the current sort option.

In addition, the following options are available from this screen:

- Jump to another alphabetical point in the list
- Filter the list by an e-product status
- Filter the list by a selection status

- Display all or only the local titles linked to the e-package. This option is available only if there are local records.
- Access the e-product and its attribute records by clicking the underlined title in the first column
- Global update (available only for selective e-package lists) – When you click the **Update** button to the right of the filter selection boxes, the Activation pop-up window opens, enabling you to update the following four fields:
  - e-Product status
  - Selection status
  - Activation from date
  - Activation to date

  In addition, you can select whether you want to update the e-package in addition to each of the e-constituents within the e-package.

Note: If you filter the e-package list, the update is performed only for e-constituents that match the filter criteria.

After you click **Submit** in the Activation pop-up window and the update is executed, a message containing information about the number of updated e-products is displayed below the filter section of the e-package list.

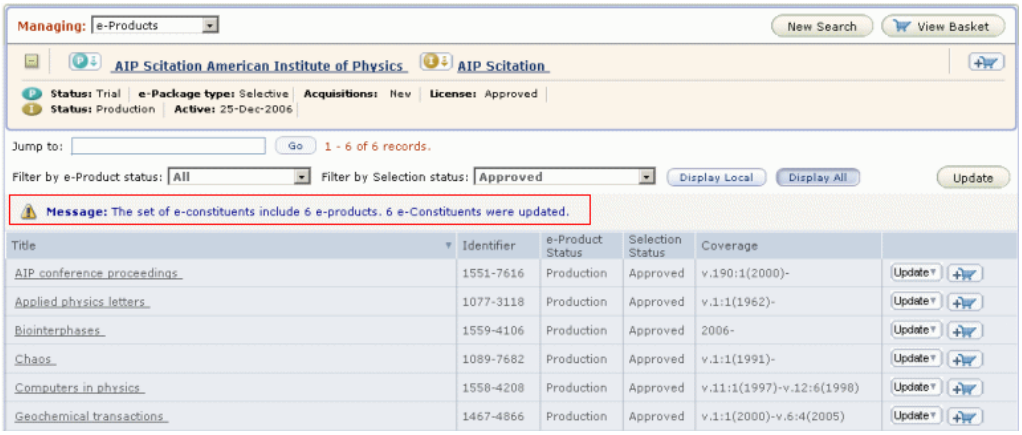

Figure 17: Updated e-Products Message

- Individual e-constituent update (available only for selective e-package lists) – When you click an individual e-constituent's **Update** button Update

(in the column on the right), a drop-down list appears, displaying the options relevant to the e-constituent's selection status.

Figure 18: e-Constituent Update

In the above example, the e-constituent has a selection status of **Review**, so the only update options are **Approved**, **Rejected**, and **Deactivate**.

If the **Activate** option is available and you select this option, the Activation pop-up window opens, prompting you to enter the data required to activate the e-constituent. The values entered in these fields are used to update the e-constituent in the e-package list.

Note that there is a section in which you can enter the local holdings. In addition, the global coverage for the e-constituent is displayed.

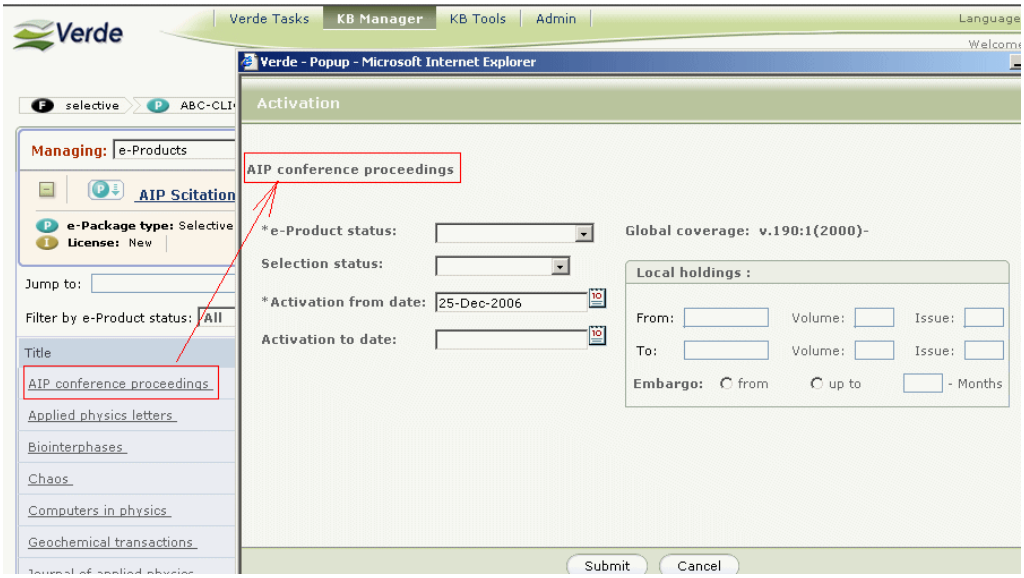

Figure 19: Activation Window

If the **Deactivate** option is available and you select this option, the Deactivation pop-up window opens, prompting you to enter the data required to deactivate the e-constituent. The values entered in these fields are used to update the e-constituent in the e-package list.

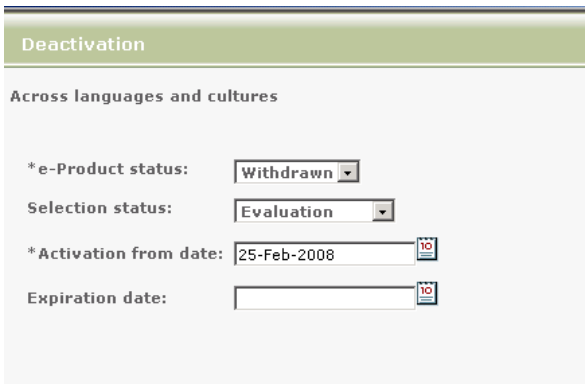

Figure 20: Deactivation Window

The pink summary box above the list of e-product titles displays the following information:

- the name of the e-package and e-interface
- the status of the e-package
- the selection status of the e-package
- the e-package type
- the active date for the e-package

6

e-Product Attribute Records

This section includes:

- **About e-Product Attribute Records** on page **47**
- **e-Product Summary Tab** on page **51**
- **Inheritance of e-Product Attribute Records** on page **55**
- **Copying and Pasting e-Product Data** on page **57**

About e-Product Attribute Records

You can link several attribute records to an e-product, enabling you to manage the e-product. In principle, all attribute records can be linked to all e-product types. However, note the following:

- e-Print records can have only acquisition and cost records.
- e-Interface, e-package, e-standalone, and e-constituent records can have acquisition, license, access, admin, cost, usage, and workflow records.
- Only e-interface, e-package and e-standalone records can have trial records.

Note: All attribute record options are visible in the left menu, even if some of the attribute record options are not relevant for the selected e-product type.

The following attribute records are available:

- Acquisitions, local acquisitions, and invoice records
- License and prevailing terms records
- Access records
- Administrative records, local admin statistics, incidents, breaches

- Trial records
- Cost records
- Usage records
- Workflows

The e-product with its linked work record and attribute records is called the e-product unit.

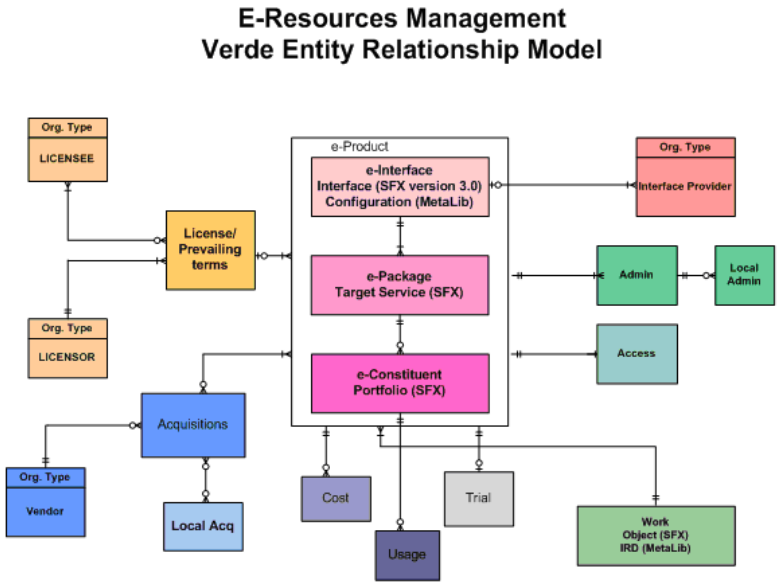

Figure 21: The e-Product Unit

To display a full e-product record and its related attribute records, click the e-product button from the search results screen, or the e-product name from any other screen.

The e-product screen that is displayed is divided into several areas. On the left is a menu bar enabling you to access the e-product and e-product attribute records. In the upper area of the screen, there is a brief summary of the e-product and its parent records. The right pane contains the work area. You can configure Verde to display either the e-product details pane or the summary pane by default. For more information about this configuration option, contact your Implementation or Support representative.

Left Menu

The left menu enables you to navigate between attribute records. If an attribute record exists at any level (e-interface, e-package, or e-constituent) for the e-product displayed, a vertical green bar is displayed to the left of the attribute

record name in the left menu. In the example below, the e-product has three attribute records—Acquisition, License, and Access.

Figure 22: e-Product Left Menu

Work Area

The work area may contain:

- A summary screen of the e-product.
- One of the related e-product attribute records. This may be a detailed form screen or a list of records.

For example, the illustration below displays the Acquisition Record List in the work area.

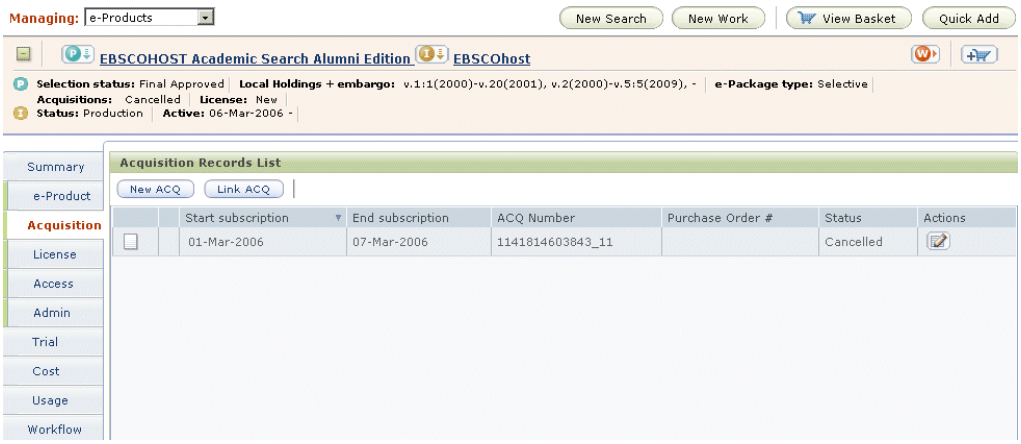

Figure 23: Work Area

e-Product Summary

The brief summary area at the top of the screen contains summary information about the e-product and can remain visible as you navigate through the e-product attribute records. The top line displays the first 25 characters of the e-product title and the first 25 characters of the e-package and/or e-interface title. Icon buttons are used in the summary to indicate the e-product type and can be used for navigation.

For example, in an e-constituent brief summary, you see information from the e-constituent, its package, and its interface. Each record is displayed on its own line.

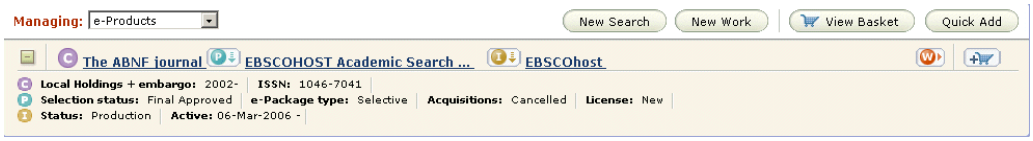

Figure 24: e-Constituent Brief Summary

In an e-standalone brief summary, you see information from the e-standalone and its interface.

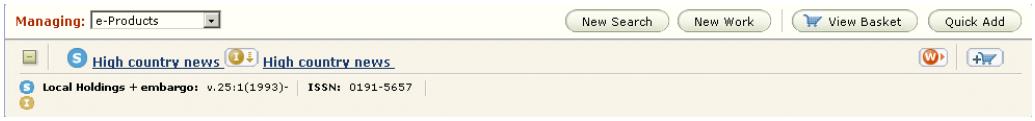

Figure 25: e-Standalone Brief Summary

e-Package brief summaries include details about the package and its interface.

e-Interface and e-print records contain details of the single record.

The following fields are displayed in the brief summary of an e-product record. They are displayed only if they are populated:

- e-Product status
- Selection status
- Active from date
- Active to date
- Holdings (either local or global)
- ISSN
- Format
- Availability
- Package type
- Acquisition status
- License status

- Interface provider

The brief summary area offers the following functions:

- Edit work record – Click the **Open Work** button to view/edit the e-product's work record.
- Add to basket.

e-Product Summary Tab

The e-product **Summary** tab is available for all e-product types. This tab is a useful display for non-expert users. It collects information from all of the relevant e-product and e-product attribute records.

The information is divided into the following sections: e-product and work information, e-product information, libraries, acquisitions, admin, trial, and workflow. Each section summarizes relevant values (for example, the Trial section includes trial parameters, status, start and end dates, and so forth).

The Summary tab includes several types of data—text, icons, and links. The text is displayed regardless of your user permissions. However, you can link to the attribute records only if you have the appropriate privileges. For example, you can link to the license record only if you have privileges to view licenses.

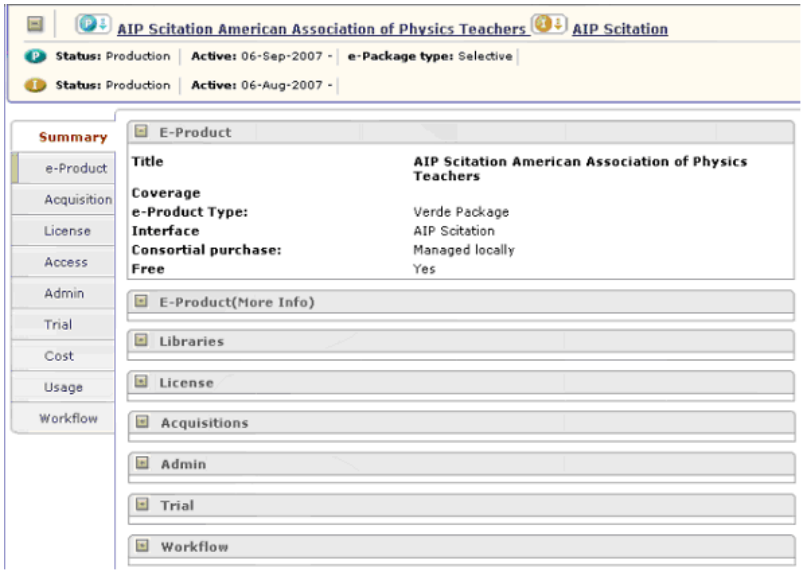

Figure 26: Summary Tab

The Summary tab includes the following fields:

Table 3. Summary Tab

Section	Fields	Comments
e-Product	Title	Title of e-product. For e-constituent summary contains also titles of related e-package and of e-interface.
	Coverage	If local coverage exists, it is displayed. If not, global coverage is shown.
	e-Product type	e-Product type value of work record.
	Interface	Name of interface name to which e-product belongs.
	Consortial purchase	Relevant only for shared multi-instance environments. There are three possible values: managed for all, managed for some (for central instance), and managed locally (for local instance).
	Free	Free or subscription.
	Other work data	The following fields will be included in the summary if they exist: issn/isbn, time span, coverage note, update frequency.

Table 3. Summary Tab

Section	Fields	Comments
e-Product (More Information)	Availability	Availability start and end date if availability is down.
	e-Product status	
	Selection status	
	Sponsoring library	
	Selector	Library contact
	Note	Public note
	Interface provider	Relevant only for e-interface. Organization responsible for the interface.
	View access setting	Link to access list. Link is available for users with view access permissions.
	Link to resource	Verde provides access to an SFX menu displaying the electronic full-text service for e-constituents or e-standalones. It is available for active e-products only.
	Open URL activated	**Open URL activation status** value in e-product admin record.
Libraries	Active for	List of libraries that have access to the e-product.

Table 3. Summary Tab

Section	Fields	Comments
License	View license settings	Link to license. Link is available for users with view license permissions.
	Licensor	
	Licensee	
	Start and end dates	License start and end dates
	License status	
	Renewal date	
	Renewal type	
	Link to attachment	Link to license attachment. Link is available for users with view license permissions.
	Public note	License public note
	General terms note	License general terms note
	User restriction note	License user restriction note
	Use restriction note	License use restriction note
	ILL print of fax	
	Perpetual rights	
Acquisitions	Acquisition status	
	Purchase order number	
	Vendor	
	Print cancellation restriction	
	Latest invoice status	
Admin	Hardware requirements public	
	Software requirements public	
	View admin settings	Link to admin record. Link is available for users with view admin permission.

Table 3. Summary Tab

Section	Fields	Comments
Trial	Start date	
	End date	
	Status	
	Decision date	
	Purchase decision	
Workflow	Title	Title of active workflow. The title is linkable and opens task list of workflow.

The Summary tab in a shared environment displays merged data from central and local instances. For more information see the **e-Product Summary Tab** on page **470**.

Note: The Summary tab is configurable. For more information, see **Configuring the e-Product Summary** on page **436**.

Inheritance of e-Product Attribute Records

Active e-products inherit attribute records from a higher-level e-product. An e-constituent inherits attribute recordss from the e-package to which it belongs, and an e-package or e-standalone inherits attribute records from the e-interface to which it is linked.

The down arrow indicates that the attribute record is part of the e-product's parent record. If the e-product is active, the parent's attribute records are inherited. If the e-product is not active, the attribute records are not inherited and are displayed for informational purposes only.

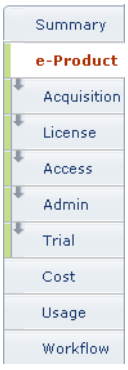

Figure 27: Inheritance of e-Product Attribute Records

Note: It is possible to configure Verde so that parent attributes are not displayed for inactive e-constituents. To enable this feature, contact your Implementation or Support representative.

The following e-product attribute records can be inherited:

- Admin records
- Access records
- Trial records
- Acquisition records
- Local acquisition record (via the acquisition record)
- License records and prevailing terms

Cost and usage records are not inherited.

If an attribute record is inherited, it is inherited in its entirety. There is no partial inheritance.

Attribute records are inherited only when the e-product does not have an attribute record of its own.

For example:

- An e-constituent can have its own acquisition record. If it does, it is not subject to the related e-package's acquisition record.
- If the e-constituent does not have an acquisition record, it inherits the acquisition record from the e-package.

e-Packages and e-constituents cannot inherit acquisition records from an e-interface.

License and prevailing terms have a special rule. Unlike other attribute records, licenses and prevailing terms are always inherited. The child always inherits the parent's license and prevailing terms, unless the child has a license of its own. If the child has a license of its own, only the license is inherited and the child needs to create a prevailing terms record to reconcile the two licenses (the explicit and the inherited). In other words, licenses and prevailing terms are cumulative. For more information on prevailing terms, see **Prevailing Term Records** on page **116**.

Copying and Pasting e-Product Data

Attribute record details from one e-product can be copied to another e-product.

> **Note:** This function is relevant for license, access, and admin records only.

Copying Attribute Record Details

On the details screen of the record that you want to copy, click the **Copy** button .

Figure 28: Copying Attribute Details

After you have clicked the **Copy** button, the **View Clipboard** button is displayed on the top line of the e-product screen.

Figure 29: View Clipboard Button

Click the **View Clipboard** button if you want to view the contents of the clipboard.

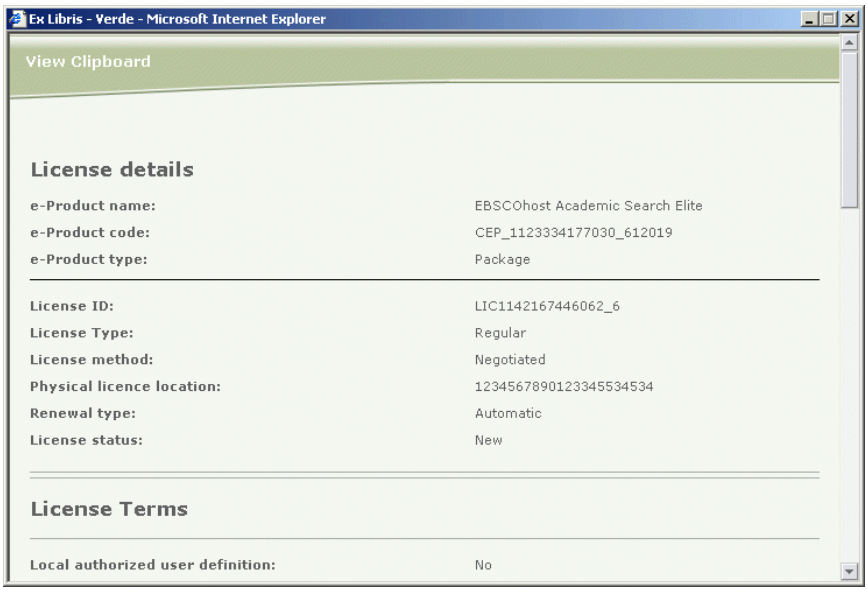

Figure 30: View Clipboard

Pasting Attribute Record Details

Locate the e-product record in which you want to paste the details that you copied to the clipboard and click the relevant tab in the left menu.

The **Paste** button is displayed at the top of the list if the paste function is available.

Figure 31: Pasting Attribute Details

Note: The paste function is available only if the attribute record can be added.
The paste function is always available for license records, but is available for access and admin records only if there are no access or admin records for the e-product and you have create/edit permissions for access/admin.

Paste functionality is available in multi-instance environments as well as in a single-instance environment. For information about the copy/paste functionality in multi-instance environments, see **Copy/Paste Attribute Profiles** on page **450**.

7

e-Product Records

This section includes:

- **Overview of the e-Product Tab** on page **59**
- **Adding New e-Product Records** on page **62**
- **Creating e-Product Sets** on page **64**
- **Editing e-Product Records** on page **66**
- **Deleting e-Product Records** on page **67**
- **List of e-Product Fields** on page **68**

Overview of the e-Product Tab

When you click the **e-Product** tab in the left menu of the e-product screen, the e-product details pane is displayed. The pane contains the following three tabs:

- General Information
- Interoperability
- Libraries

General Information

This tab covers areas relating to:

- Status
- Activation and expiry dates
- Availability
- Concurrent number of users
- Global coverage (for all e-products except e-interface)
- Local holdings and so forth (for all e-products except e-interface)

- Sponsoring library. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined libraries with a filter by role option.

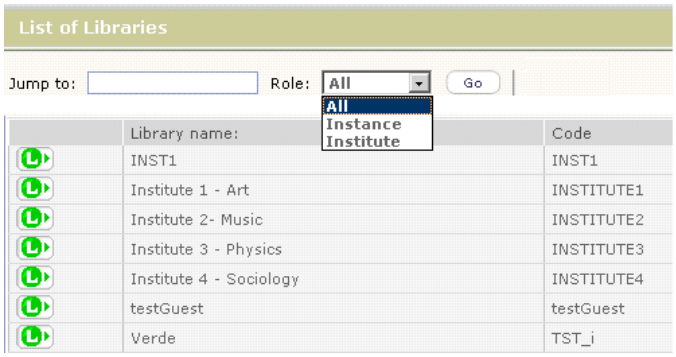

Figure 32: List of Libraries

- Library contact. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with a filter by role option.

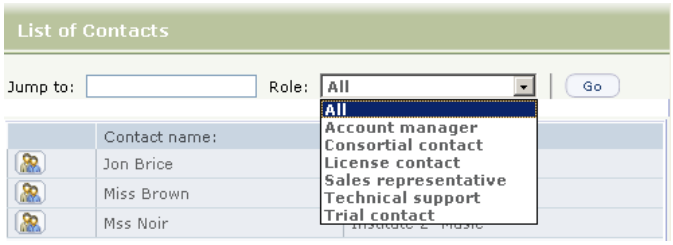

Figure 33: List of Contacts

- Interface provider (for e-interface)

Interoperability

This tab contains fields relating to:

- SFX ID
- MetaLib ID
- Update target
- e-Product code
- Additional IDs
- Creation date (automatically generated by Verde)

- Update date (automatically generated by Verde)

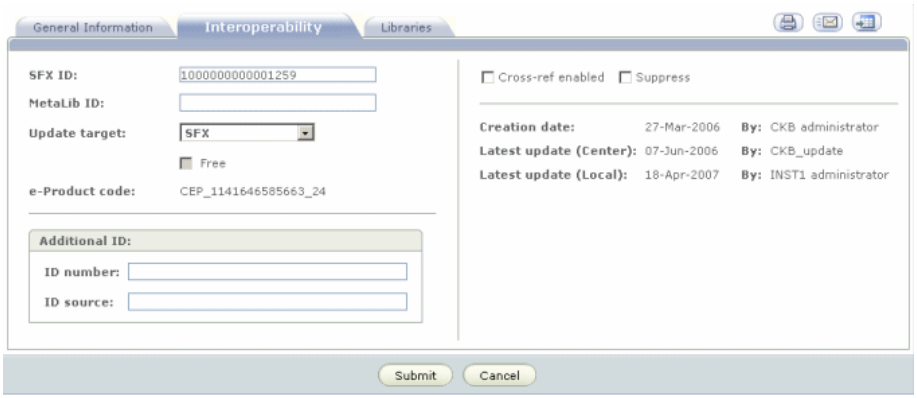

Figure 34: Interoperability

Libraries

This tab is available for all types of e-product records except e-interface records. It is used to list libraries that hold the e-product. In addition to marking a library as active, you can enter library-specific coverage data.

e-Products can be activated for:

- Individual libraries
- All libraries (select **All**)
- All libraries except specific ones (select **All** and then clear the check boxes for the libraries that should not be active)

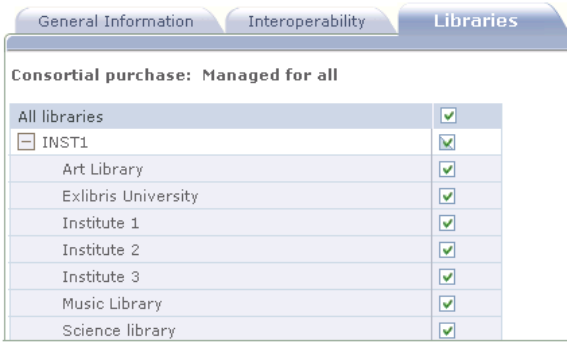

Figure 35: Libraries

An e-constituent inherits the library settings of its e-package. To activate additional libraries for the e-constituent, click the **Add** button in the e-

constituent record's **Libraries** tab and select the additional libraries that hold the e-constituent.

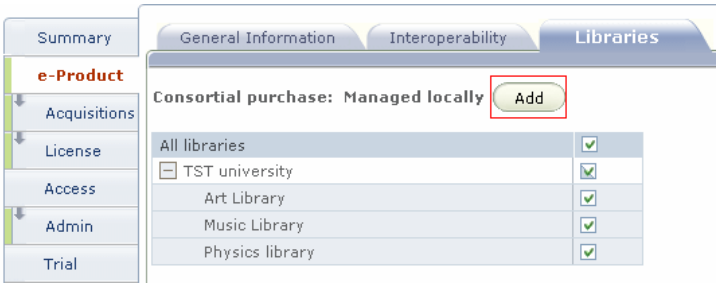

Figure 36: Selecting Libraries that Hold the e-Constituent

The **consortium purchase** level of the e-product is set automatically by the system, based on the library settings. If the e-product is active for all libraries, the consortium purchase level is **Managed for all**, if it is active for some libraries, the consortium purchase level is **Managed for some**, and if it is active locally, the consortium purchase level is **Managed locally**.

Adding New e-Product Records

When the KnowledgeBase does not contain an e-product for a resource, you must create a new e-product record.

Note: You can create an e-product record only if you have edit e-product permissions.

You can create an e-product record in one of the following ways:

- By creating an e-product set (e-package + e-interface or e-standalone + e-interface) using the Quick Add wizard or an alternative manual procedure. For more information, see **Creating e-Product Sets** on page **64**.
- By creating a work record and associating it with an e-product. For information about creating a work record, see **Adding New Work Records** on page **36**.
- By attaching an e-product to an existing work record, as described in this section.
- By loading multiple e-constituent or e-standalone e-products via e-constituent and e-standalone loaders. For more information, see **About Verde Loaders** on page **231**.

To attach an e-product to an existing work record:

1 In the e-product search result screen or e-product screen, click the **Open Work** button to open the e-product's work record. The work record contains the title and description of the e-product. Work records can be centrally or locally created. (For more information on work records, see **About Work Records** on page **35**.)

2 Click the **New** button that is displayed beside or above the work record. A drop-down list is displayed.

3 Select the appropriate e-product type from the drop-down list. Available types are: e-package, e-constituent, e-standalone, e-interface, and e-print. The system creates a new e-product record of the type selected. The new e-product record is automatically linked to the designated work record. Note that the system allows you to create e-product records only of the same e-product type that was assigned to the work record.

Table 4. Work Record e-Product Types

Work Record e-Product Type	Allowable Verde e-Products
BOOK	e-constituent, e-standalone, e-print
CITATION	e-constituent, e-standalone, e-print
CONFERENCE	e-constituent, e-standalone, e-print
DATABASE	e-constituent, e-standalone, e-print
DISSERTATION	e-constituent, e-standalone, e-print
DOCUMENT	e-constituent, e-standalone, e-print
Verde Interface	e-interface
JOURNAL	e-constituent, e-standalone, e-print
Verde package	e-package
PROCEEDINGS	e-constituent, e-standalone, e-print
REPORT	e-constituent, e-standalone, e-print
SERIES	e-constituent, e-standalone, e-print

After the e-product record is created, enter the appropriate information in the **General Information**, **Interoperability**, and **Libraries** tabs and click **Submit**. In the **General Information** tab, ensure that you build the appropriate links

between the e-product and its parent record by selecting the relevant e-package or e-interface in the **Belong to e-Package** or **Belong to e-Interface** field.

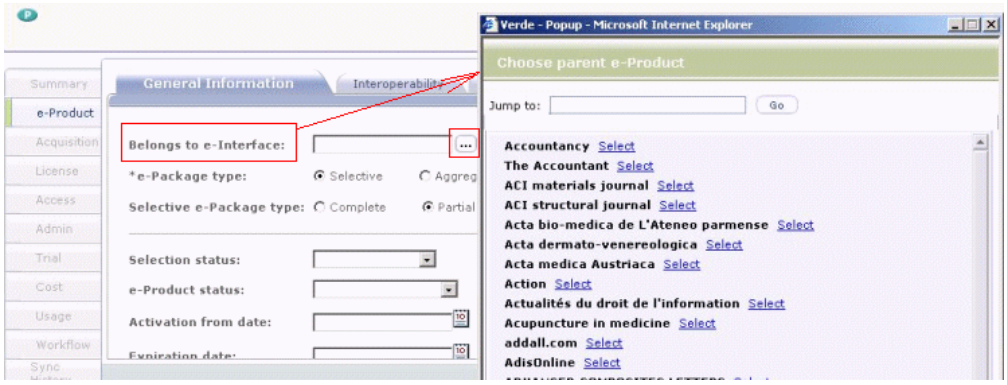

Figure 37: Belong to e-Interface

Creating e-Product Sets

You can create an e-product set using the Quick Add wizard or a manual procedure. This section describes both ways of creating an e-product set.

The Quick Add Wizard

The Quick Add wizard contains five steps that allow for the quick creation of an e-package + e-interface or of an e-standalone + e-interface.

To create an e-product set using the Quick Add wizard:

1. In the e-product search result screen or e-product screen, click the **Quick Add** button in the top-right corner to launch the wizard. In the first screen, select **e-Package** or **e-Standalone** from the **Type** drop-down list and click **Next**.
2. In Step 2, enter the e-package or e-standalone basic bibliographic details. Note that the e-package **Title** field is mandatory, as are the e-standalone **Title** and **Type** fields. Click **Next** to continue.
3. In Step 3, enter the e-package or e-standalone status details. Note the following:
   - For e-package – The e-package type fields are mandatory. If the **Activation from** field is filled in, **e-Product status** is mandatory. If the **e-Product status** field is filled in, but the **Activation from** field is left empty, the current date is registered.

- For e-standalone – If the **Activation from** field is filled in, the **e-Product status** field is mandatory. If the **e-Product status** field is filled in, but the **Activation from** field is left empty, the current date is registered.

Click **Next** to continue.

4 In Step 4, choose **Select e-Interface** to access a list of existing e-interfaces. When the list is displayed, you can browse alphabetically through the list, or search for an e-interface by entering a search string in the search box. Once the e-interface has been found, click the **Select e-Interface** button to add it to the record. Click **Next**.

If an e-interface does not exist, select **Create new e-Interface**, enter the e-interface name in the **Title** box, and click Next. A new e-interface work record is automatically created with the title that you previously entered in the **Title** box. You can modify this title or leave it as is.

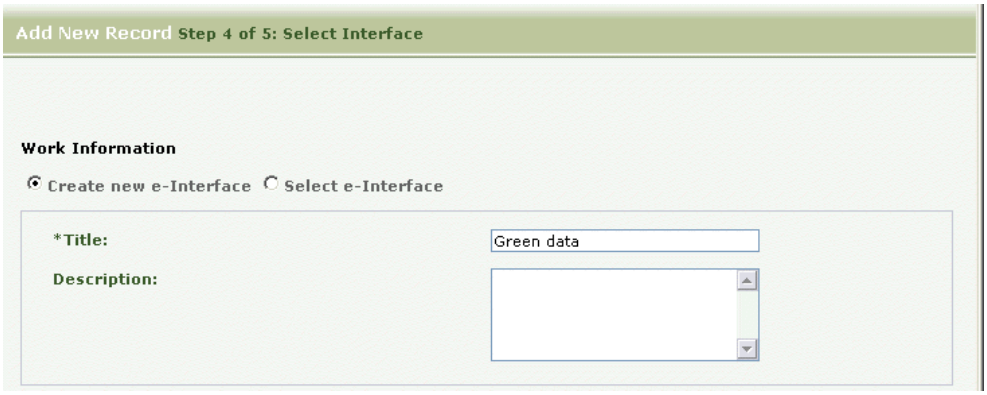

Figure 38: Add New Record – Step 4 Select e-Interface

5 In Step 5, select one of the following options:

- **Exit** – Closes the wizard and takes you back to your original screen.
- **Add another record** – Takes you back to Step 1 to add another record using the wizard.
- **Edit the new e-product** – Takes you to the edit screen for the e-product.

Creating an e-Product Set Manually

If you want to create an e-product set and do not want to use the Quick Add wizard, you can create an e-product set manually by following the steps below.

To create an e-product set manually:

1 Create an e-interface.

2 Create an e-package or e-standalone.

3 Open the e-product that you created in the previous step and click **Belong to e-Interface**. The Choose e-Product window opens displaying a list of e-interfaces.

4 In the **Jump to** box, enter the title of the e-interface that was created in step **1** above.

5 Select the e-interface from the list and submit the e-product. The e-product set is created with a hierarchical relationship.

Editing e-Product Records

To edit an e-product record, you must have write privileges for the instance as well as edit e-product permissions. This section describes how to edit e-constituent records, as well as e-package and e-standalone records.

Note: When updating an e-product record, you can update only local e-product fields. Global fields that are maintained by Ex Libris via the KnowledgeBase—such as **e-Product type**, **e-Package type**, and **Global holdings**—cannot be edited.

Editing e-Constituent Records

e-Constituent records always belong to an e-package. The status fields that can be updated vary depending on the package type of the e-constituent's parent. If the e-constituent belongs to an aggregator package, none of the four status-related fields can be updated because in aggregator packages, these fields are controlled exclusively on the package level.

With selective package e-constituents, you have more flexibility. The values of all four status fields can differ from the value of the same field in the e-constituent's parent. However, there are rules that govern the interaction between the fields in the e-constituent and those in the e-package. The rules are as follows:

- To activate an e-constituent, the e-package must itself be active. Note that unlike e-interfaces, e-packages are never automatically activated.
- If an e-package has been rejected and withdrawn, all of its e-constituents become inactive and withdrawn.

For more information about the interaction between e-packages and their e-constituents, as well as the approval and activation workflows, see **Selection Workflows** on page **73**.

e-Constituents have five fields that are set globally:

- SFX ID

- Global holdings
- Global embargo
- JKEY
- Belongs to package

Editing e-Package and e-Standalone Records

e-Package and e-standalone records are both attached to e-interfaces. When activating an e-package or e-standalone, the system checks the status of the attached e-interface record. If it is not already active, the system activates it using the same **Active from** date as the lower-level record. The e-product status is set to **Production**.

e-Package records have six fields that are set globally:

- e-Product type
- e-Package type
- Global holdings
- Global embargo
- SFX ID – In e-package records, this is the SFX Target Service Internal ID. In e-standalone records that come from SFX, this is the SFX Object Portfolio Internal ID.
- Belongs to interface

All other fields can be set locally. Note that e-packages rarely have global holdings data.

e-Standalone records have five fields that are set globally:

- e-Product type
- Global holdings
- Global embargo
- Belongs to interface
- SFX ID – This is the SFX Object Portfolio Internal ID

Deleting e-Product Records

In a single-instance environment, e-product records that were created locally can be deleted only if the e-product record does not have any associated attribute records. If an e-product has associated attribute records, these records must be deleted before you can delete the e-product record. In a consortium environment, locally created e-products are automatically propagated to other

instances. These e-products can be deleted only if they can be deleted in all instances.

e-Products that are part of the KnowledgeBase cannot be deleted.

Note: You can delete an e-product only if you have delete e-product permissions.

List of e-Product Fields

Verde uses a single database table for all e-product types. This table contains some fields that are common to all types and other fields that are specific to one e-product type. The following table lists the fields, field types, and field usage.

Table Legend

- A = Field is present in all types
- P = Field is present in e-package
- I = Field is present in e-interface
- S = Field is present in e-standalone
- C = Field is present in e-constituent
- * = required field

Table 5. List of e-Product Fields

Tab	Field Name	Type	Description
General Information	e-Product type*	A	Interface, Package, Standalone, Constituent, Print. This field cannot be updated.
	e-Package type*	P	Type of e-package – selective or aggregator
	Selective e-package type	P	Are you purchasing the entire e-package?

Table 5. List of e-Product Fields

Tab	Field Name	Type	Description
	Selection status	A	Current selection status of the e-product. Values are: ■ Removed ■ Review ■ Approved ■ Final Approval ■ Rejected ■ Evaluation
	e-Product status	A	Implementation status of the e-product. Values are: ■ Trial ■ Implementation 1, 2, and 3 ■ Production ■ Withdrawn
	Activation from date	A	Date from which the e-product is active
	Expiration date	A	Date until which the e-product is active. When this date is reached, Verde will change the e-product status to **Withdrawn**.
	Availability status	A	Availability status – default for an active e-product is **available**. If the e-product is unavailable, then set the value of this field to **down**.
	Availability status start date	A	Start of the period when the e-product is unavailable
	Availability status end date	A	End of the period when the e-product is unavailable
	Availability note	A	Note to accompany availability status
	Concurrent number of users	A	Concurrent number of users for this e-product
	Sponsoring library	A	Library 'responsible' for the e-product

Table 5. List of e-Product Fields

Tab	Field Name	Type	Description
	Library contact	A	Library contact name
	Interface provider	I	Organization responsible for the interface
	Public note	A	This note can display in external applications such as the OPAC, A-Z lists, and SFX.
	Internal note	A	This note is displayed to Verde staff only.
	Global coverage from Year, Vol. Issue	P, C, S	Coverage available from the vendor. These fields cannot be updated.
	Global coverage to Year, Vol. Issue Year	P, C, S	Coverage available from the vendor. These fields cannot be updated.
	Global embargo operator	C, S	Type of embargo – from X months or up to X months. This cannot be updated.
	Global embargo	C, S	Number of months that are embargoed. This cannot be updated.
	Local holdings from Year, Vol. Issue	P, C, S	Coverage available locally. These three fields are repeated three times.
	Local holdings to Year, Vol. Issue	P, C, S	Coverage available locally. These three fields are repeated three times.
	Holdings note	P, C, S	
	Local embargo	C, S	Type of embargo - from X months or up to X months
	Local embargo type	C, S	Number of months that are embargoed locally
	ILS holdings ID	P, C, S	Pointer to holdings record in ILS
Interoperability	MetaLib ID	A	Pointer to matching record in MetaLib
	SFX ID	A	Pointer to matching record in SFX

Table 5. List of e-Product Fields

Tab	Field Name	Type	Description
	Update target	A	Should update information to be sent to: ■ SFX ■ MetaLib ■ ILS
	Free	A	Is the resource available free of charge?
	Additional ID number	A	Pointer to record in alternate system
	ID source	A	ID of alternate system
	JKEY	C, S	Used for linking. This is a global field that cannot be changed.
	Title key	C, S	Locally defined abbreviated title that can be added to the URL for direct linking
	Cross ref enabled	P, S	The check box can be selected when the SFX customer is a CrossRef library affiliate member and linking to article level is available via CrossRef.
	Suppress	A	Indicates if the e-product is hidden from Public View. Not functional.
	Creation date	A	The date the record was created. Automatically generated by Verde.
	Created by	A	Verde user
	Updated by	A	Verde user
	Latest update date (CKB)	A	CKB update date. Date that the KB record was updated by Ex Libris in the Central KB. Automatically generated by Verde.
	Latest update date (Local)	A	LKB update date. Automatically generated by Verde.

Table 5. List of e-Product Fields

Tab	Field Name	Type	Description
Libraries	Consortial purchase	P, C, S	Possible values are: ■ Full – purchased for every member of the consortium ■ Partial – purchased for some members of the consortium ■ Local – purchased locally
	Libraries	P, C, S	Option to define the libraries that have the e-product, together with details of their holdings

8

Selection Workflows

This section includes:

- **About Selection Workflows** on page **73**
- **Evaluation** on page **74**
- **Review** on page **75**
- **Approval and Final Approval** on page **75**
- **Rejection** on page **76**
- **Activation** on page **77**
- **Table of e-Product Updates** on page **78**

About Selection Workflows

The value selected in the e-product record's **Selection status** field determines the e-product selection workflow that will be followed.

Verde supports the following e-product selection workflows:

- Evaluation
- Review
- Approval
- Rejection
- Activation

The e-product selection process involves online and batch updates, as well as Verde reports. The process relies on relationships between e-product records, as well as relationships between e-product and acquisition records. The selection process is closely related to acquisition workflows. For more information about acquisition workflows, see **Acquisition Workflows** on page **100**.

Evaluation

e-Products can be evaluated as part of the trial workflow, or independently of this workflow. To initiate the e-product evaluation process, assign the selection status **Evaluation** to the e-product. If the e-product is an aggregator package, the selection status of all e-constituents related to this package is updated to **Evaluation**. If the e-product is a selective package, you use the **Update** button in the e-package list to update the selection status of the package and all its e-constituents to **Evaluation**.

Note: It is recommended that you assign the **Evaluation** selection status only to e-products that are not active.
If an e-product is assigned a **Trial** status, Verde automatically assigns a selection status of **Evaluation** to the e-product.

After an e-product has been assigned a selection status of **Evaluation**, e-product selectors review the e-product and assign it a new selection status of **Approved** (e-constituent), **Final Approval** (e-package, e-standalone or e-interface), or **Rejected**. Note that the e-product selection status is indexed and can be searched online using the status index. The e-Products by Selection Status Verde report can also be used for this purpose.

Evaluating e-Constituents

During the evaluation process, selectors review e-constituents and update their selection status to **Approved** or **Rejected**.

e-Constituents of selective packages can be updated by clicking the e-constituents' **Update** buttons in the package list. You can updated multiple e-constituents by adding them to the basket and using the update function in the basket. In addition, an e-constituent loader exists to simultaneously update the status of large groups of e-constituents within a package. For more information on the e-constituent loader, see **e-Constituent Input Files** on page **243**.

Note: e-Constituents of selective packages should be reviewed and approved or rejected after the e-package has been approved, but before the e-package is updated to **Final Approval** or **Rejected**.

Review

The review process is performed regularly for subscriptions that are not automatically renewed, typically on an annual basis. During the review process, selectors evaluate acquisition records and the e-products that are purchased through these records, paying attention to both usage and cost data. At the end of the review process, e-products are either approved and the acquisition records renewed, or they are rejected and the acquisition records are cancelled. For more information on renewing acquisition records, see **Acquisition Workflows** on page **100**.

Both the acquisition and selection status **Review** can be assigned manually, or automatically using the Verde task **Subscriptions for Review**. The automatic process retrieves the e-products of acquisition records that are not marked **Auto-renew** and updates both the acquisition record and the e-product that is being acquired by assigning them an acquisition status and selection status of **Review**.

During the review process, e-products are reviewed and approved or rejected. For aggregator packages, because the packages must be purchased in their entirety, the review process is conducted on the level of the package and not its e-constituents. Thus, when aggregator e-packages are updated to **Review**, their e-constituents are updated as well. Similarly, the e-constituents cannot be individually approved or rejected. In contrast, when selective packages are updated to **Review,** their e-constituents must be manually updated to **Review** using the **Update** buttons in the package list. The approval/rejection process for e-constituents in selective packages must be performed in the same way.

To approve an e-package, e-interface, or e-standalone, assign a selection status of **Final Approval**. To approve e-constituents of selective packages, assign a selection status of **Approved**.

> **Note:** It is recommended that the final approval/rejection of packages be performed after all of the package's e-constituents have been approved or rejected.

Approval and Final Approval

Approval can follow evaluation or review.

The selection status **Approval** is used to indicate preliminary approval. When this status is assigned to a selective package, it means that the review of the package e-constituents should begin. When this status is assigned to any other e-product, it means that there is preliminary but not final approval.

The selection status **Final Approval** means that the e-product has been approved either for activation or for renewal. The status **Final Approval** can be assigned directly to e-products of type e-interface, e-package, and e-standalone. It should not be assigned directly to e-constituents. e-Constituents are updated by the system as a result of an update to their e-package record, or manually, using the **Update** buttons in the package list.

The following rules apply to e-constituent updates:

- Aggregator Packages – When the package is updated to a selection status of **Final Approval**, the selection status of all e-constituents is automatically updated to **Final Approval**.
- Selective Packages – Use the filter in the package list to filter for approved e-constituents. Then use the **Update** buttons to update the selection status of each e-constituent and activate it.

Rejection

Rejection can occur as part of an evaluation or a review process, or it can occur independently. Rejecting an active e-product has very different consequences than rejecting an inactive one.

When an active e-product is rejected, an **Activation to date** is assigned either by you or by the system. The **Activation to date** controls when the e-product is withdrawn. If there is an active acquisition record, the **Activation to date** uses the **Subscription end date** found in the acquisition record. If there is no acquisition record, the current date is used as the **Activation to date**. You can change this date manually.

There is no need to update e-products that are not yet active and have been rejected. In these cases, the selection status is retained for historical purposes. For more information about rejection as part of a trial, see **Trial Workflow** on page **148**.

Rejecting an aggregator package affects all of the package's e-constituents. The selection status of each of the e-constituents is updated to **Rejected** and an **Activation to date** is assigned. Rejecting a selective package involves a manual process. You use the filter function in the package list to select all active e-constituents, and then use the **Update** buttons to update the selection status of each of the e-constituents to **Rejected** and assign an **Activation to date**.

Note: The status of active e-products that have been rejected is not updated to **Withdrawn** online. Instead, Verde updates the e-product status to **Withdrawn** based on the **Activation to date** of the e-product record, using a process that is regularly run. For more information, see **e-Product** on page **220**.

Activation

Activation typically occurs after the evaluation process is run. However, e-products can be activated without conducting an evaluation process. Activation can be performed online, or by using the Verde e-constituent loader. In Verde, e-products are considered active when they have an e-product status and an **Activation from date**.

Online, you can assign an e-product status and then submit the e-product. If there is an acquisition record with the status **Active**, the system uses the **Subscription start date** as the e-product **Activation from date**. If there is no acquisition record, the current date is used.

Activating e-Standalones, e-Interfaces, and Aggregator Packages

To activate e-standalones, e-interfaces, and aggregator packages, activate the e-product itself. When an e-standalone or e-package is activated, the system automatically activates the related e-interface, if it is not already active.

The e-interface is always assigned an e-product status of **Production**. The **Activation from date** is the date entered in the related e-product. When you activate an aggregator package, its e-constituents are assigned the same e-product status and **Activation from date** as the e-package.

Activating Selective Packages

This process is somewhat more complex than it is for other e-products because of the complexity of the interaction between e-constituents and their packages. The e-constituents of selective e-packages can be selectively activated in cases where some, but not all, of the e-constituents are purchased.

When a selective e-package is activated, a message appears to remind you that the e-constituents related to the package should be updated accordingly.

Managing: e-Products
New Search
New Work
View Basket
AdisOnline
AdisOnline
e-Package type: Selective
Status: Production
Active: 10-Jan-2007 -
Message:
The status(es) of the constituents in this package have not been updated. To update the constituents' status(es) view the package list and update the constituents as needed.
Operation ended successfully

Figure 39: Selective e-Package Message

You use the filter function in the package list to select all the approved e-constituents that you want to activate, and then use the **Update** buttons to activate each of the e-constituents. Note that it is possible to activate all e-constituents of a selective package using the **Update** button that is displayed in

the top-right corner of the package list screen (when no filter is applied). For more information about working with the package list, see **e-Package List** on page **43**.

Activating e-Constituents in Active Selective Packages

Once a selective package is active, its e-constituents can be activated in one of the following ways:

- by clicking the **Update** button in the top-right corner of the package list or in the basket
- by updating the **e-Product status** field in the constituent's e-product screen.
- in batch mode, using the Verde e-constituent loader.

For more information about updating e-constituents in the package list, see **e-Package List** on page **43**. For more information on the e-constituent loader, see **e-Constituent Input Files** on page **243**.

Table of e-Product Updates

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Evaluation – update selection status to Evaluation	Standalone	No	N/A	
	Interface	No	N/A	
	Package – aggregator	No	N/A	Updates all e-constituents to **Evaluation** selection status.
	Package – selective	No	N/A	Must manually update all e-constituents to **Evaluation** selection status using the update function in the package list.

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Review – assign a selection status of Review	Standalone	Yes	N/A	
	Interface	Yes	N/A	
	Constituent	Yes	N/A	
	Package – aggregator	Yes	N/A	Updates all e-constituents to **review** selection status.
	Package – selective	Yes	N/A	Must manually update all e-constituents to **Review** selection status using the update function in the package list.
Approve – update selection status to Approved	Standalone	N/A	N/A	
	Interface	N/A	N/A	
	Constituent	N/A	N/A	

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Final Approval – update package to Final Approval	Package – aggregator	N/A	N/A	Updates all e-constituents to **Final Approval**.
	Package – selective	No	N/A	Updates all e-constituents with a selection status **Approved** to **Final Approval**, and selection statuses **Evaluation** and **Review** to **Null**. Other selection statuses remain unchanged.
	Package – selective	Yes	Yes	**Approved:** Updates selection status to **Final Approval**. If not yet active, activate using the **Subscription start date**.
				Rejected: Assign an **Activation to date** using **Subscription end date**.
				Evaluation and Review: Null
				All others: No update
	Package – selective	Yes	No	**Approved:** Update selection status to **Final Approval**. If not active, activate using current date.
				Rejected: Assign an activation to date – use current date.
				All others: No change

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
Activate – make an e-product active by assigning an e-product status and an Activation from date	Standalone	No	Yes	Take the **Activation from date** from the **Subscription start date** of the active acquisition record. If the interface is not active, then activate.
			No	Use the current date as the **Activation from date** – can be overwritten. If the interface is not active, then activate.
	Interface	No	Yes	Take the **Activation from date** from the **Subscription start date** of the active acquisition record.
		No	No	Use the current date as the **Activation from date**.
	Constituent of selective package	No	Yes	Activate online by clicking the **update** button in the package list. Assign an e-product status and an **Activation from date**. If no **Activation from date** is assigned, takes the **Activation from date** from the **Subscription start date**.
	Package – aggregator	No	Yes	Updates all e-constituents. The e-constituents get the package e-product status and the package **Activation from date**. Takes the **Subscription start date** as the default **Activation from date**. If the interface is not active, then activate.
		No	No	Updates all e-constituents. The e-constituents get the package e-product status and the package **Activation from date**. Take the current date as the default **Activation from date**. If the interface is not active, then activate.

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
	Package – selective	No	Yes	Updates all e-constituents that have a selection status of **Final Approval**. These e-constituents get the package e-product status and the package **Activation from date**. The package **Activation from date** is taken from the **Subscription start date**. If the interface is not active, then activate.
		No	No	Updates all e-constituents that have a selection status of **Final Approval**. These e-constituents get the package e-product status and the package **Activation from date**. The package **Activation from date** is taken from the current date. If the interface is not active, then activate.
Reject – update the selection status of an e-product to Rejected	Standalone	Yes	Yes	Uses the **Subscription end date** of the current acquisition record as the **Activation to date**. The default can be overwritten.
		Yes	No	Uses the current date as the **Activation to date**. The default can be overwritten.
		No	N/A	No action
	Interface	Yes	Yes	Uses the S**ubscription end date** of the current acquisition record as the **Activation to date**. The default can be overwritten.
		Yes	No	Uses the current date as the **Activation to date**. The default can be overwritten.
		No	N/A	No action

Table 6. e-Product Selection Status Updates

Action	Type	Is e-Product Active?	Is There an Acq?	Results
	Constituent of selective package	Yes	Yes	No action until package is approved or rejected.
	Package – aggregator	Yes	Yes	Uses the **Subscription end date** of the active acquisition record as the **Activation to date**. Updates the selection status and **Activation to date** of all e-constituents.

9

Acquisition Records

This section includes:

- **About Acquisition Records** on page **85**
- **Acquisition Records List** on page **86**
- **Acquisition Details** on page **88**
- **Acquisitions Tab** on page **91**
- **Local Acquisitions Tab** on page **97**
- **Invoice Tab** on page **98**
- **Acquisition Workflows** on page **100**

About Acquisition Records

Verde does not offer a fully configured acquisition system. The actual payment of money and fiscal transaction takes place in your ILS. Verde's acquisition and invoice data only reflects transactional activity that took place in the library's automated management system.

The acquisition record tracks the acquisition process for one or more e-products. It stores all of the information needed to order, renew, and cancel a subscription to these e-products. An e-product can be linked to only one active acquisition record per subscription period.

A separate acquisition record in Verde is required for each subscription period. Only the first acquisition record is created manually or loaded. All subsequent acquisition records are created by the system as part of the renewal process.

Typically, acquisition records are managed at the level of e-packages and e-standalone resources. However, it is also possible to create an acquisition record for an e-interface or e-constituent if it is acquired separately.

Local Acquisition Records

In Verde, there is a single active acquisition record per e-product or group of e-products. However, in many cases, the cost of an electronic resource needs to be divided among sub-units within the library. Local acquisition records are used to record such information. They provide information on how the cost is allocated between contributing libraries or sub-units.

A local acquisition record is linked to specific subscription periods (that is, it is linked to a specific acquisition record).

Invoice Records

The invoice record is used to store invoice information. Verde itself does not have an invoicing system, but it is possible to load invoices that are managed in other systems using the Acquisitions Data Loader, or enter the information online.

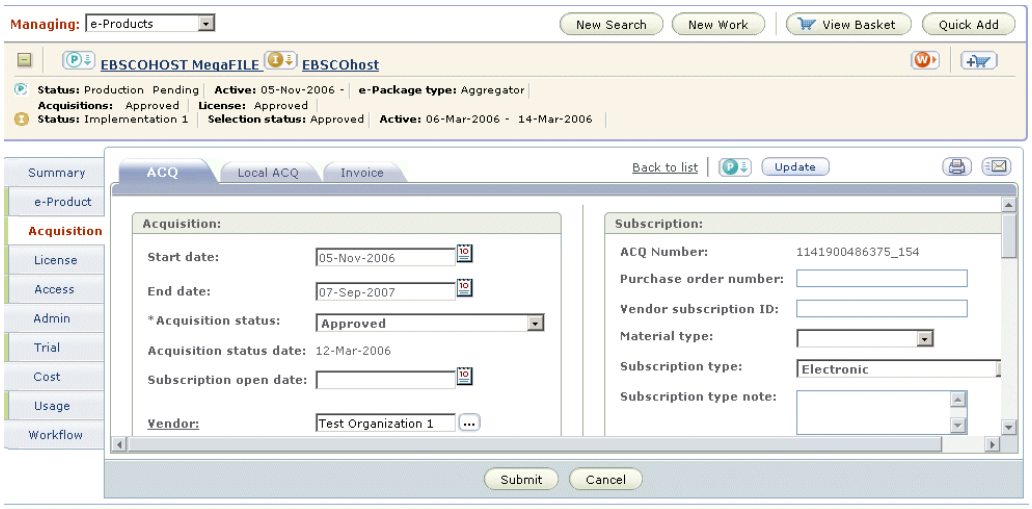

Figure 40: Acquisition Records

Acquisition Records List

The **Acquisition Records List** displays the list of acquisition records for a particular e-product. Verde has an acquisition record for each year that a subscription is active. Records display in reverse chronological order, such that the most recent record is displayed first. The Acquisition Record List displays acquisition records for the particular e-product and, if the e-product is an e-constituent record, it also displays acquisition records for the constituent's e-package. Acquisition records associated with a particular e-product can be

edited from the list, while inherited records can be edited by clicking the inheritance icon that is displayed in the first column of the list.

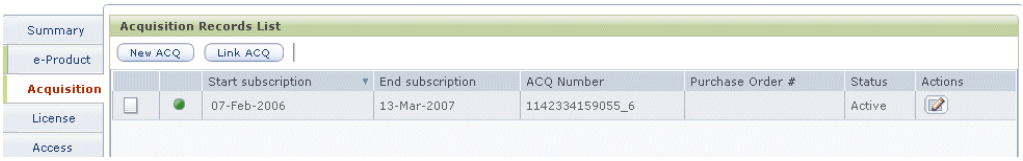

Figure 41: Acquisition Records List

The Acquisition Records List displays the following information for each record:

- whether the record is the parent record or the inherited record. An inherited record opens in edit or display mode, depending on your privileges.
- if the record is currently active. (The record must have the status **Active** or **Review**.)
- the subscription start and end dates. (The **Start Subscription** column is automatically sorted from latest to earliest.)
- the acquisition number
- The purchase order number
- The status of the acquisition record
- buttons to perform the following actions:
  - **Open Acquisition** – if you have editing privileges and the acquisition record is not inherited
  - **View Acquisition** – if the record is inherited and/or you do not have editing privileges

The following two function buttons display above the list of acquisition records:

- **New ACQ** – opens a new, blank acquisition form
- **Link ACQ** – links the e-product record to an existing acquisition record.

Click **Renew** to open the next year's record. More information about acquisition renewal is available in **Acquisition Workflows** on page **100**.

If there is an active acquisition or renewal workflow, the **Workflow** button is displayed above the Acquisition Records List. Clicking the button opens the list of tasks for the workflow.

Acquisition Details

The acquisition record has a single tab, **Acquisitions**, that contains all of the fields for the acquisition record.

There are two additional tabs that display: one for **Local Acquisitions** and the other for **Invoices**. Local acquisitions and invoices are linked to specific annual acquisition records. However, when an acquisition record is renewed, the system copies the local acquisition records as well as the acquisition record. Invoice records are not copied, but display from all acquisition records that share the same acquisition number.

If a local acquisition record or invoice record does not already exist, one can be added from the **Local Acquisitions** or **Invoice** tab. For a full list of fields in each of these tabs, see **Acquisitions Tab** on page **91**.

Adding New Acquisition Records

To create new acquisition records, click **New ACQ** in the Acquisition Records List. Note that only users with editing privileges are able to create new acquisition records.

To renew an acquisition record, click **Renew**. The following year's acquisition record opens. (The **Renew** button is displayed in the Acquisitions tab when appropriate.) Note that there are separate permissions for renewing an acquisition record and assigning the status **Active** to an acquisition record.

Editing Acquisition Records

To edit an acquisition record, click the **Open Acquisition** button in the **Actions** column of the Acquisition Records List. The **Open Acquisition** button is displayed in the list only if you have editing privileges.

Package-level acquisition records can be edited only from the Acquisition Records List of the e-package record. In an e-constituent record, the e-package acquisition record can be viewed only.

You can access the acquisition record of an e-package by clicking the **Edit Inherited Record** button that is displayed in the first column of the Acquisition Records List. The e-package acquisition record can then be updated. In the illustation below, the Acquisition Records List displays an e-constituent-level record. The down arrow on the **Acquisition** tab in the left

menu indicates that the acquisition record is inherited. The spectacle icon in the Actions column indicates that you can only view the record and not update it.

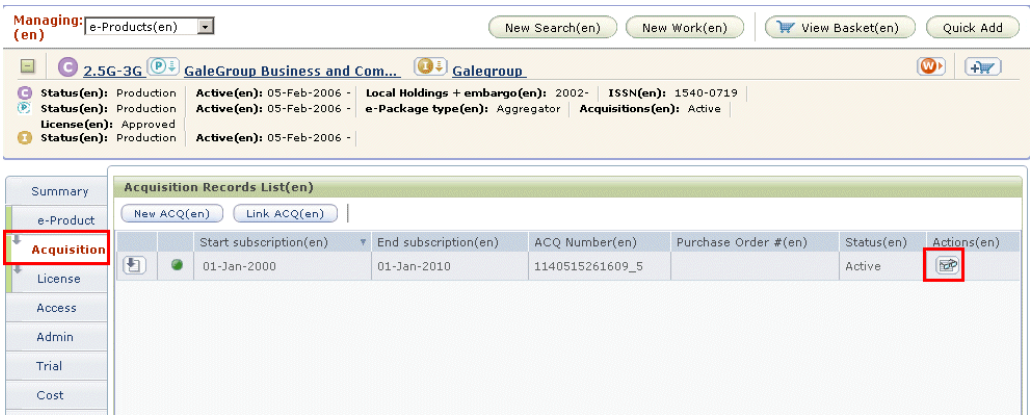

Figure 42: Editing Acquisition Records

Linking Acquisition Records

To link an e-product record to an existing acquisition record, click **Link ACQ**. This option should be used when multiple e-product records are acquired through a single subscription.

In such cases, you should first create a new acquisition record for one of the e-products, then click **Link ACQ** to link the remaining e-products to the existing acquisition record. Note that you do not have to link e-constituents to their e-package acquisition record. The system automatically links active e-constituents to their e-package acquisitions.

When you click **Link ACQ**, a pop-up window opens, enabling you to enter the acquisition number or purchase order number of the acquisition record to which you want to link your e product. If there are multiple acquisition records

with the same acquisition number or purchase order number, ensure that you specify the appropriate year.

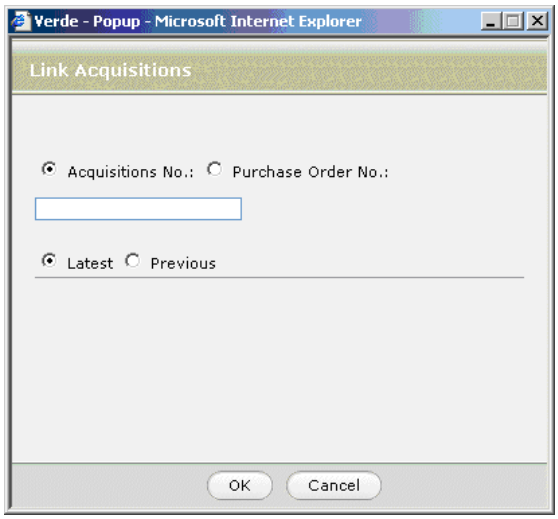

Figure 43: Link Acquisitions

When an acquisition record is connected to multiple e-products, you can open it for editing from the Acquisition Records List of each of the e-products to which it is connected. Once an acquisition record is linked to an e-product, the **Related** tab is displayed. This tab displays the e-product title, e-product status and selection status of each e-product that is connected to the acquisition record. You can navigate to an e-product by clicking the e-product name link.

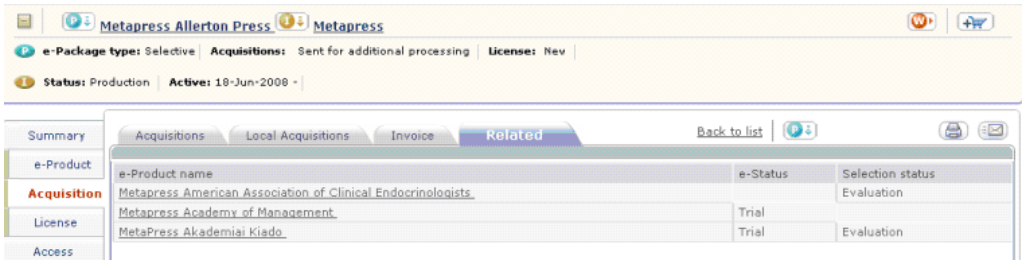

Figure 44: Acquisition Record – Related Tab

Note: When you delete an acquisition record that is linked to multiple e-products, the record is deleted from every one of the e-products to which it is connected.

Deleting Acquisition Records

Acquisition records can be deleted only if:

- They have a status other than **Approved**, **Active**, **Cancelled**, **Renewed**, or **Send for additional processing**.
- They are not linked to an invoice or a local acquisition record.
- They are not related to a workflow.
- You have delete acquisition permissions.

If an acquisition record can be deleted, it can be deleted only from the Acquisitions tab, using the **Delete** button that is displayed above the acquisition details. The **Delete** button does not display if you do not have appropriate privileges or if the record cannot be deleted.

Printing and E-Mailing Acquisition Records

Individual acquisition records can be printed and e-mailed by clicking the **Print** or **E-Mail** buttons. These buttons appear above the acquisition record. The **Print** button prints all fields in the acquisition record that contain data, as well as all local acquisition and invoice records. Title information for all e-products acquired by the acquisition record is also included in the printout.

The **E-Mail** button opens a window that allows you to enter the e-mail addresses of the sender and recipient, as well as a subject and note. The e-mail address in the user record is used by default in the **To** field, but this address can be overwritten. To send the acquisition record to more than one recipient, separate recipients using semicolons. The body of the e-mail message includes all of the fields from the record that contain data.

Acquisitions Tab

The fields in the Acquisitions tab are divided into sections. The following table describes the fields within these sections.

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
Acquisitions	Start and end dates	SUBSCRIPTION STARTDATE SUBSCRIPTION ENDDATE	The start and end dates of the acquisition record are the start and end dates of the annual subscription. The **Subscription open date** contains the start date of the first subscription.

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Acquisition status	ACQUISITION STATUS	The status of the acquisition record, controlled by a drop-down list. There are eleven possible statuses. New statuses cannot be added but existing statuses can be removed. (The statuses that appear in the list are defined in the Admin module.) Status codes are stored in the database and these cannot be changed. The display constant, however, can be changed in the Admin module. Standard setup provides the following statuses: ■ New ■ In Process 1, 2, 3 ■ Approved ■ Denied ■ Sent for Additional Processing ■ On Hold ■ Active ■ Renewed ■ Cancelled
	Acquisition status date	ACQUISITION STATUSDATE	The date that the acquisition status was assigned.
	Subscription open date	ORDERDATE	The date that the subscription was first opened. Corresponds only to the acquisition start date on new subscriptions.
	Vendor	VENDORCODE	The vendor for the subscription. Click to open the list of organizations. Any organization can be selected, though the organization you want is most likely to have the role **Vendor**. To view only vendors, select the role **Vendor** from the drop-down list and click **Submit**. Click the **Select Organization** button to select an organization. Once an organization has been selected, click the hyperlinked vendor to see a list of contacts for the vendor.

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Vendor (continued)		**Note:** If the vendor is missing from the list of organizations, you can add the vendor by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.
	Budget	BUDGETS	The name of the budget or fund that is paying for the subscription.
Renewal/ cancellation	Advance notification period	SUBSCRIPTION NOTIFICATION	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.
	Auto renewal	AUTORENEWAL	Controls renewal. Acquisition records that are marked for auto renewal are renewed by the Verde task **Subscription Renewal**.
	Advance notice date	ADVANCE NOTICEDATE	Calculated by the system based on the **Advance notification period** and the acquisition end date.
	Renewal/ cancellation date	RENEWCANC DATE	Date on which the acquisition record was renewed or cancelled.
	Renewal/ cancellation decision note	RENEWCANC DESCISION NOTE	The reason for canceling or renewing the subscription.
	Renewal/ cancellation note for ILS	RENEWCANC NOTEILS	Send/display in ILS
	Renewal/ cancellation note for vendor	RENEWCANC NOTEVENDOR	Sent to vendor
	Print cancellation restriction	PRINTCANCEL RESTRICTION	Contractual restrictions on canceling subscriptions for print versions of journals contained in the package.
	Print cancellation note	PRINTCANCEL NOTE	Note field. Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license.

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
Subscription	Acquisition number	ACQUISITION NUMBER	Unique number assigned by the system. The acquisition number can be shared by multiple acquisition records
	Purchase order number	PURCHASE ORDERNO	Pointer to an acquisition record in another system. If the purchase order number is an ALEPH order number, the ALEPH order can be displayed online.
	Vendor subscription ID	VENDOR SUBSCRIPTION CODE	Unique ID provided by the vendor
	Material type	MATERIALTYPE	Available types are: ■ Journal ■ A/I database ■ Article database ■ Database ■ e-Book
	Subscription type	SUBSCRIPTION TYPE	Available types are ■ Electronic ■ Print ■ Electronic & Print ■ Electronic & Print Surcharge ■ Print & Electronic Surcharge The display names can be modified in the Admin module.
	Subscription type note	SUBSCRIPTION TYPENOTE	Note field
	Note for ILS	NOTEFORILS	Note for ILS system
	Note for vendor	NOTEFOR VENDOR	Note to be included in correspondence with vendor.
Price and Payment	Final price	PRICE	Annual price of the subscription.

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Method of acquisition	ACQUISITION METHOD	Drop-down list with the following options: ■ Purchase ■ Gift ■ Free ■ Exchange
	Discount on price	DISCOUNTON PRICE	Percentage discount negotiated with vendor.
	Pricing model	PRICINGMODEL	Note field. A description of the fee structure applicable to the product.
	Price cap	PRICINGCAP	Amount by which the price can rise. This is the maximum percentage of annual increase in a multi-year agreement.
	Price cap period from and to	PRICINGCAP FROM PRICINGCAPTO	Dates on which the price cap begins and ends.
	Price note	PRICENOTE	The note field that contains additional information regarding the subscription price.
	Inflation rate	INFLATIONRATE	Defined in percentage terms.
	Consortial agreement	CONSORTIAL AGREEMENT	Indicates whether an acquisition falls under a multi-party agreement that uses the same license for all parties.
	Pooled concurrent users	POOLED CONCURRENT USERS	The number of concurrent users if shared across a consortium, rather than within a specific institution. This number may be spread across one or more e-products.
	Concurrent users note	CONCURRENT USERSNOTE	Note field. Can be used for: ■ A specific explanation of how users are allocated or shared if pooled or platform-based. ■ Additional information about the number of concurrent users
	List price	LISTPRICE	Listed price

Table 7. Acquisitions Tab Fields

Section	Field Name	Code	Description
	Net price	NETPRICE (from the SUBSCRIPTION PERIOD Oracle table)	Net price
	Currency	CURRENCY (from the SUBSCRIPTION PERIOD Oracle table)	Currency

New Acquisition Records

When an acquisition record is new, it is at the beginning of the acquisition workflow. There are no mandatory fields and any information added is saved. Sites that have set up interaction with ALEPH can push new acquisition records to their ALEPH database. This option is available for the following e-product types: e-package, e-standalone, and e-interface. For more information, refer to the *ALEPH-Verde Interoperability Guide*.

Interim Acquisition Statuses

The following acquisition statuses all reflect stages in the local acquisition workflow:

- In Process 1-2
- Ready to be approved
- Approved
- Review
- Denied
- Sent for Additional Processing
- On Hold

You can remove statuses that are not in use, or change the names of statuses to better reflect your own, local workflows. Changes to display names are made in the Admin module.

Active Acquisition Records

The statuses **Active** and **Review** both indicate that an acquisition record is in use. Both statuses have the following mandatory fields:

- Start and end date
- Acquisition status
- Vendor
- Auto-renewal
- Subscription type

Only acquisition records that are active are processed by the Verde tasks **Subscription Renewal** and **Subscription Review**.

Renewed Acquisition Records

The status **Renewed** is assigned to acquisition records for past years. These records are no longer active, but they were renewed, so an active acquisition record was created. The system automatically assigns the status **Renewed** to records when they are renewed using the **Renew** online or batch function.

Cancelled Acquisition Records

The status **Cancelled** is assigned manually to acquisition records that are to be cancelled. When acquisition records are cancelled, linked e-product records must be manually updated and an expiration date assigned to the e-product.

Local Acquisitions Tab

Local acquisition records can be added to acquisition records using the **Local Acquisitions** tab. The **Add Local ACQ** button does not display in this tab until a general acquisition record exists.

Local acquisition records can be deleted by clicking the **Delete** button that is displayed next to the local acquisition record. To delete local acquisition records, you must have delete privileges.

Records can be accessed and edited by clicking the **Expand All** button, or the + (plus) sign next to a specific record.

The following table describes the fields in the Local Acquisitions tab.

Table 8. Local Acquisitions Tab Fields

Field	Description
Institution	The institution paying for/ sharing the costs of the e-product
No. of concurrent users	The number of concurrent users
Concurrent users note	Note field
Cost share	The amount that the institution is paying for the e-product
Cost share percentage	The percentage amount that the institution is e paying for the e-product
Currency	Currency of the amount defined above
Cost share date	Date of the cost sharing
Cost share note	Note field
Budget	Information about the budget that covers the cost

Invoice Tab

Invoice records store information about invoices for the acquisition record. Invoices that are managed in other systems can be loaded into Verde using the Acquisitions Data Loader. The **ILS invoice ID** field in Verde stores the ID of the invoice in the external system and can be used for matching and updating invoice records.

Invoice records are linked to annual acquisition records. However, once they have been created, invoice records display on all acquisition records that share an acquisition number. In this way, it is possible to view invoice history.

Creating New Invoice Records

To create a new invoice record, from the **Invoice** tab of the acquisition record, click **Add Invoice**. Invoices can be added to a new acquisition record only after the acquisition record has been submitted and saved to the server. You must have editing privileges to create new invoice records.

Editing Invoice Records

Records can be accessed and edited by clicking the + (plus) sign next to a specific record.

Deleting Invoice Records

To delete an invoice record, click the **Delete** button in the invoice summary line of the acquisition record's **Invoice** tab. You must have delete privileges to delete invoice records.

Invoice Tab Fields

The following table describes the fields in the Invoice tab.

Table 9. Invoice Tab Fields

Field	Description
Invoice date	A mandatory field. If no date is defined, it is not be possible to submit/update the record.
Invoice status	Possible options are: ■ Unpaid ■ Ready to be paid ■ Paid
Payment date	
Vendor	Enables you to browse to the list of organizations.
Invoice number	A mandatory field. If not defined, it is not possible to submit the record.
Line number	A mandatory field. If not defined, the default, 0, is used.
ILS invoice ID	The invoice ID number in the external ILS. This field is used to match and upload by the Verde loaders.
Budgets	
Object code	Object codes in the external ILS related to the budget.
From and to dates	The period that is being invoiced
Credit or debit + amount	Credit or debit amount
List price	
Net amount	
Total amount	

Table 9. Invoice Tab Fields

Field	Description
Currency	
VAT code	
VAT amount	
Number of units	
Note	Note field

Acquisition Workflows

The acquisition workflow includes processes that are performed online as well as processes that are performed by or with the help of Verde tasks and reports. Note that acquisition processing and e-product selection are closely related and records are transferred betweeen the two processes. The primary difference between the two processes is that selection is performed on individual e-products of all types, while acquisition processing occurs on the level of the acquisition record and affects sets of e-products. For more information about the selection process, see **About Selection Workflows** on page **73**.

Getting Started

Acquisition records can be created in the following two ways:

- At the beginning of your implementation process, acquisition records can be created in batch mode by the SFX localization program. This program creates an acquisition record for every e-package and e-standalone that is activated. These records are activated in Verde because they are active in your site's SFX installation.
- By clicking **New ACQ** in the Acquisition Records List. Note that a report of e-products that have been approved for purchase can be produced and used by acquisitions staff as the basis for the manual creation of acquisition records.

Processing Acquisition Records

Once an acquisition record has been created, it must be processed, approved, and made active. There is a Verde workflow for managing this process. For more information on Verde workflows, see **About Selection Workflows** on page **73**.

Verde provides a number of different tools for acquisition record tracking and reporting. You can search and retrieve e-products by acquisition status online.

You can also run a Verde report of e-products and acquisition records by acquisitions status.

Renewing and Reviewing Acquisition Records

Once the acquisition record is active, there are a number of processes that support automatic renewal and or review. The processes work off the **Advance notice date** of the acquisition record. This date is produced by subtracting the auto renew period from the acquisition end date.

Auto Renew

If an acquisition record is marked **Auto Renew**, the Verde task **Subscription renewal** automatically renews the acquisition record. When renewal occurs, a new acquisition record is opened with the status **Active** and the existing acquisition record is marked **Renewed**. All fields, except for the start and end dates, are copied from the acquisition record that was renewed. New local acquisition records are created. A report of acquisition records that have been renewed is provided by the **Subscription renewal** task.

Manual Renewal

If an acquisition record is not marked **Auto Renew**, the Verde task **Subscriptions for review** produces a report of all acquisition records that need to be reviewed before they can be renewed. This task also updates the acquisition record and all e-product records acquired using this acquisition record and assign both the acquisition record and the purchased e-products a status of **Review**. Libraries that do not review e-product records annually as part of the acquisition renewal process should run the task with the **Update database** field set to **No**. The **Subscriptions for review** process initiates the renewal workflow if it is active.

e-Product Review

Libraries that do review the e-products should review all e-products that have a selection status of **Review**. These e-products are approved or rejected during the course of the review process. The Verde **Report e-product by selection status** report should be used to produce reports of e-products for review, as well as reports of e-products that have been rejected or approved. These reports are used by the acquisitions staff. Acquisition records for e-products that have been rejected must be cancelled, while the acquisition records for e-products that have been approved must be renewed. Note that both the renewal and the cancellation are manual.

Renewing or Canceling Acquisition Records

This is the final step in the renewal process. The decision to renew or cancel the acquisition record is usually based on the e-product selection status. In order to cancel an acquisition record, update the acquisition status to **Cancelled**. If you are working with ALEPH, click the **Update** button to send a message to ALEPH so that the ALEPH order can be cancelled. Note that the update works only if an ALEPH order number is entered in the **Purchase order number** field of the acquisition record.

To renew an acquisition record, click the **Renew** button in the Acquisitions tab. Note that this button appears only if the acquisition record's status is **Active** or **Review**. Acquisition records that are not active cannot be renewed. The renewal function creates a new annual acquisition record with the status **Active**, updates the existing acquisition record to **Renewed**, and extends the license. Only licenses that have been assigned the renewal type **Automatic** are extended. Licenses that are extended automatically are extended by the amount of time entered in the **Standard duration** field of the license. If there is no standard duration, the license is extended so that the license ends on the same date as the acquisition record.

10

License Records

This section includes:

- **About License Records** on page **103**
- **License Records List** on page **104**
- **License Details** on page **105**
- **License Record Tabs** on page **109**
- **Prevailing Term Records** on page **116**
- **License Workflows** on page **117**

About License Records

A license is the legal contract between a library and a content or interface provider. It contains a legal description of the rights that have been purchased, the terms of use, and additional obligations of both parties. The Verde license record contains both structured and unstructured data fields. A license can be linked to one or more e-products and an e-product can be linked to one or more licenses.

If the e-product is linked to more than one license, it is necessary to create a **prevailing terms** record that stores the license terms that are in effect and governs the access of a particular e-product.

Typically, licenses are created for e-package and e-standalone resources. However, they may also be required for e-interfaces, where the interface is licensed separately (there may be a technology fee) and e-constituents, where the license would typically be a license rider for an individual journal that is part of a package.

License Records List

The **License Records List** displays a list of license and prevailing term records associated with a particular e-product. The License Records List includes records for the e-product itself, as well as any license and prevailing term records that are inherited from parent records.

Licenses and prevailing terms can be inherited on three levels:

- e-Constituents inherit licenses from their e-packages and e-interfaces.
- e-Standalones inherit licenses from their e-interfaces.
- e-Packages inherit licenses from their e-interfaces.

Figure 45: License Records List

The License Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the name of the license
- The start date and end date of the license. (The **Start Date** column can be sorted so that you can view the list of licenses from latest to earliest, or from earliest to latest.)
- the status of the license
- the license's type
- the license's ID
- buttons to perform the following actions:
  - edit the license, if you have editing privileges and the license record is not inherited
  - view the license, if the record is inherited and/or you do not have editing privileges
  - duplicate the license, which enables you to copy/paste the license record to the same e-product if you have editing privileges

Note: To edit an inherited license, click the **Open Inherited Record** button that is displayed in the first column of the License Records List. The parent license record opens.

Three function buttons appear above the list of license records:

- **New License** – creates a new license record.
- **Link License** – links the e-product to an existing license that it shares with another e-product.
- **New Prevailing Terms** – enables you to add a prevailing term record. This button is displayed only if there is an active license. (A license is considered active if it is of the status **Approved**.)

If there is an active license workflow for an e-product, the **Workflow** button is displayed above the License Records List. Clicking the button opens the list of tasks for the workflow.

License Details

The license and prevailing term records contain the following tabs:

- Description
- Terms
- Notes
- License Review
- Locations
- Users

There are approximately 110 licensing fields. Sites can set default values for new licenses. Default values are set by local administrators in the Admin module.

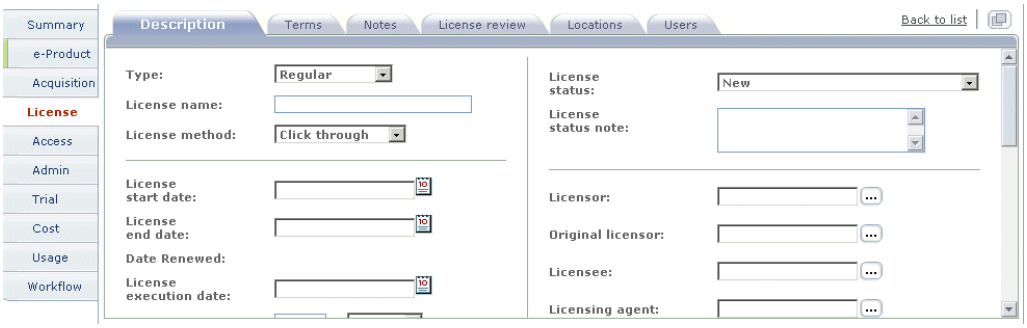

Figure 46: License Details

In the license detail tabs, the following actions are possible:

- return to the License Records List
- print the license details
- e-mail the license details
- copy the license
- paste the license

In the **Description** tab, you can add an external license file in any format. Note that there are permissions for viewing, creating, and deleting license attachments.

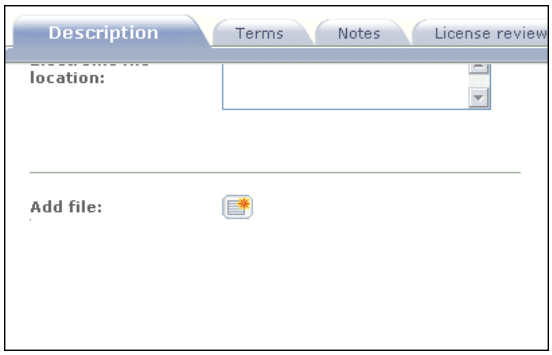

Figure 47: Adding an External License File

Adding and Editing Licenses

To create a new license record, from the License Records List, click **New License**. Note that you must have both creating and editing privileges to create new licenses.

Once an e-product has been linked to an existing license (see for details), the license is displayed and is editable from the e-product's License Records List. To edit a license, from the Actions column of the License Records List, click the **Open License** button. This button is displayed only if you have editing privileges and if the license is editable.

Package-level license records can be edited only from the License Records List of the e-package record. In an e-constituent record, the e-package licsense record can be viewed only.

You can access the license record of an e-package by clicking the **Edit Inherited Record** button that is displayed in the first column of the License Records List. The e-package license record can then be updated. In the illustation below, the License Records List displays an e-constituent-level record. The down arrow on the **License** tab in the left menu indicates that the license record is

inherited. The spectacle icon in the Actions column indicates that you can only view the record and not update it.

Figure 48: Editing License Records

Note: Separate permissions are required for approving and extending licenses.

Linking Licenses

To link an e-product record to an existing license record, click **Link License**. This option should be used when multiple e-product records are acquired through a single license.

In such cases, you should first create a new license record for one of the e-products, then click **Link License** to link the remaining e-products to the existing license record. When you click **Link License**, a pop-up window opens, enabling you to enter the license code or license name of the license record to which you want to link your e product.

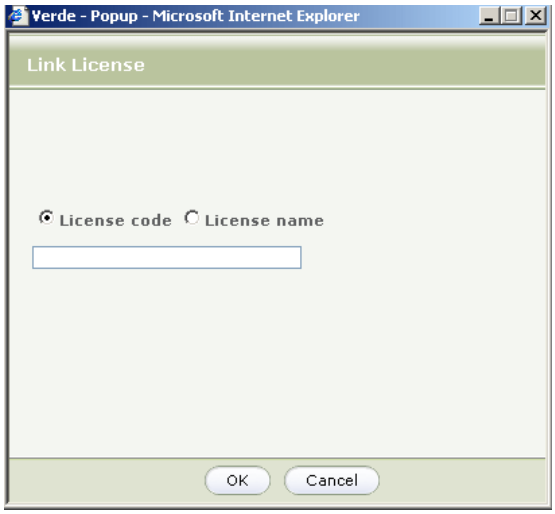

Figure 49: Link License

When a license record is connected to multiple e-products, you can open it for editing from the License Records List of each of the e-products to which it is

connected. Once a license record is linked to an e-product, the **Related** tab is displayed. This tab displays the e-product title, e-product status and selection status of each e-product that is connected to the license record. You can navigate to an e-product by clicking the e-product name link.

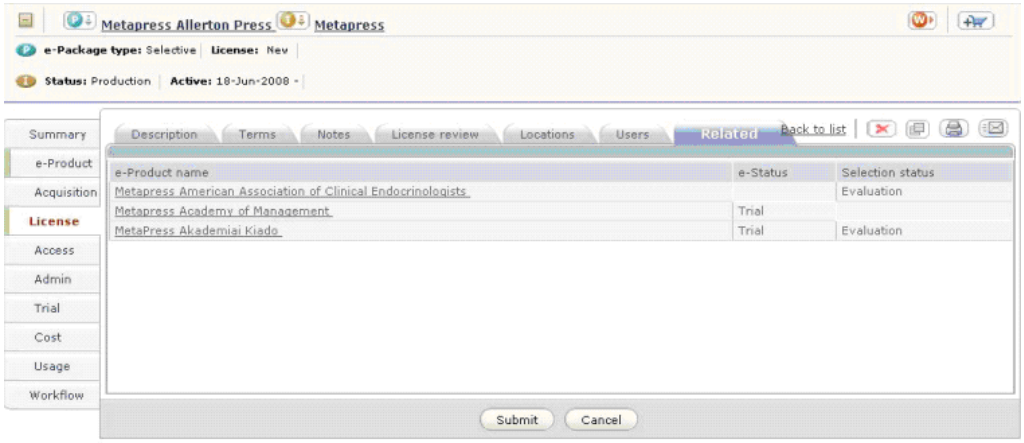

Figure 50: License Record – Related Tab

Note: When you delete a license record that is linked to multiple e-products, the record is deleted from every one of the e-products to which it is connected.

Duplicating Licenses

The **Duplicate License** button is available in the License Records List's Actions column. All licenses and prevailing term records can be duplicated for the same e-product. When licenses are duplicated, all fields except the license start and end date and license status are copied. Note that you must have editing privileges to be able to duplicate licenses. See **Copying and Pasting e-Product Data** on page **57** for more information about duplicating license information from one e-product to another.

Deleting Licenses

Licenses can be deleted only before they have been approved. Once a license has been assigned a status of **Approved** or **Retired**, it cannot be deleted. You can delete licenses only from the parent-level record and only if you have delete privileges. Licenses that have been inherited or licenses that are related to a workflow cannot be deleted. To delete a license that can be deleted, click the **Delete** button in the license details screen.

Printing and E-Mailing License Records

The **Print** and **E-Mail** buttons appear in the license details screen. When a license is printed, the printout includes all fields that contain data. In addition, the following items are included in the printout:

- license terms
- license notes
- license reviews

The titles of all e-products that are covered by the license are also included in the printout.

When the **E-Mail** button is clicked, a screen opens prompting you to enter a the addresses of the sender and recipient, a subject, and a note. The body of the e-mail message contains all fields in the license that contain data.

License Record Tabs

License records are considered active when they have the status **Approved**. The status of the license determines the list of mandatory fields.

- When a license is new, there are no mandatory fields.
- When a license is **Active** or **Retired**, the following are mandatory:
  - Licensee
  - Licensor
  - Start and end dates
  - Vendor advance notification
  - Renewal type

Note: The end date is not mandatory for perpetual renewal licenses.

Description Tab

The following table describes the fields in the license record's **Description** tab.

Table 10. Description Tab Fields

Field Name	Code	Description
License type	TYPECODE	Type of license. Once this field is defined, it cannot be modified. The following types are available: ■ Regular ■ Trial ■ Supplemental
License name	LICENSENAME	Unique name for the license.
License method	METHODCODE	License method. The following options are available: ■ Negotiated ■ Click Through ■ Online ■ Manifest Assent ■ Shrink-Wrap
License start and end dates	STARTDATE ENDDATE	Date on which the license becomes/ceases to be active.
Date renewed	RENEWAL DATE	Date on which the license was renewed.
License execution date	EXECUTION DATE	Date on which the license was executed.
Standard duration	LICENSE DURATION LICENSE DURATIONVAL	Used when licenses are renewed. Can be defined in weeks, months, or years.
Vendor advance notice	VENDOR ADVANCED NOTICE	Amount of time before the license expires that you need to cancel your subscription. Can be defined in days, weeks, or months.

Table 10. Description Tab Fields

Field Name	Code	Description
Renewal type	RENEWALTYPECODE	Controls how the license is renewed. Possible values are: ■ Automatic ■ Explicit ■ Perpetual
License URI	LICENSEURI	Link to electronic version of license.
License URI type	LICENSEURITYPE	Link type. Possible values are: ■ URI ■ URN ■ URL
Physical license location	PHYSICALLOCATION	Note field.
Electronic file location	FILELOCATION	Pointer to file location.
Auto-renewal cancellation period	NONRENEWALNOTICEPERIOD NONRENEWALNOTICECODE	The amount of advance notice required prior to license renewal if the licensee does not want to renew the subscription. The time interval in which the **Non-renewal notice period** is measured. Default values are: **Days**, **Weeks**, and **Months**. Thes values can be customized using the code table.
Add file	ATTACHMENTNAME	Option to link to an electronic version of the license agreement.
License status	STATUSCODE	Status of the license.
License status note	STATUSNOTE	Note field.

Table 10. Description Tab Fields

Field Name	Code	Description
Licensor	LICENSOR	The organization granting the license. **Note:** To open the list of organizations, click the **Browse** button. Although you can select any organization from this list, it is likely that you will want to select an organization with the role of **Licensor**. (To view only licensors, select the **Licensor** role from the drop-down list and click **Submit**.) Click the **Open Organization** button next to an organization to select it. Once an organization has been selected and the license record has been submitted, click the hyperlinked licensor to view a list of contacts for the organization. If a licensor is missing from the list of organizations, you add the licensor to the list by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.
Original licensor	ORIGINAL LICENSOR	The original organization granting the license. (See the note for the previous field name.)
Licensee	LICENSEE	The library licensing the e-product.

Table 10. Description Tab Fields

Field Name	Code	Description
Licensing agent	LICENSING AGENT	The organization licensing the e-product. **Note:** To open the list of organizations, click the **Browse** button. Although you can select any organization from this list, it is likely that you will want to select an organization with the role of **Licensing Agent**. (To view only licensing agents, select the **Licensing Agent** role from the drop-down list and click **Submit**.) Click the **Open Organization** button next to an organization to select it. Once an organization has been selected and the license record has been submitted, click the hyperlinked licensing agent to view a list of contacts for the organization. If a licensing agent is missing from the list of organizations, you add the licensing agent to the list by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.
Local licensing negotiator	LOCAL LICENSING NEGOTIATOR	The library contact responsible for negotiating the license.
License delivery requirements	DELIVERY REQUIREMENTS	The required medium in which official communications must be delivered.
Licensing note	LICENSING NOTE	Note field.
Public note	PUBLICNOTE	Note field.
License replaced by	REPLACEDBY	License code of later license.
License replaces	REPLACES	License code of earlier license.
License history note	LINKEDLICENSE NOTE	Note field.
License code	LICENSECODE	Automatically generated by Verde.
Creation date	CREATEDDATE	The date on which the record was created. Automatically generated by Verde.
Created by	CREATEDBY	Verde user.
Latest update	UPDATEDATE	The date on which the record was updated. Automatically generated by Verde.

Table 10. Description Tab Fields

Field Name	Code	Description
Latest update by	UPDATEDBY	Verde user.

Notes Tab

The **Notes** tab stores license use notes for a given license or prevailing terms. There are two types of notes:

- Public
- Internal

Public notes are made available to external systems via SOAP services. Local notes can be added and edited by users with editing privileges. Notes can be deleted by users with delete privileges. The **Delete** button is displayed at the head of the record if the record is expanded, or in the summary line if the record is collapsed.

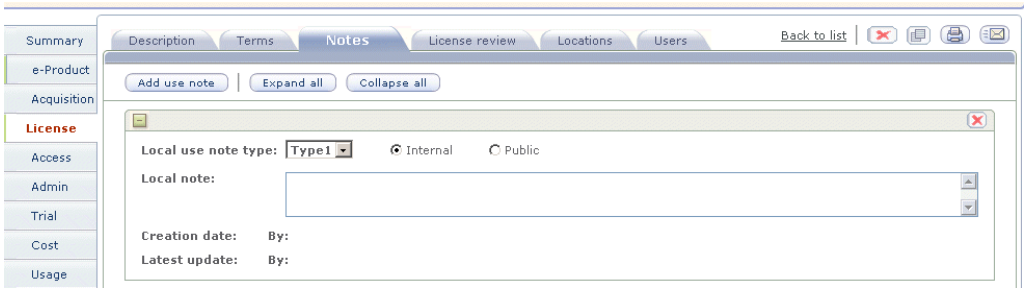

Figure 51: License Notes

License Review Tab

The **License Review** tab stores notes added by license reviewers. Note the + (plus) sign to the left of the one-line summary. When clicked, the entire license review opens. In this way, library evaluators' reviews and opinions can be stored in a single location.

The following fields are available in the license review record:

- Reviewer
- Review date
- Note field

Users with editing privileges can create and edit license reviews. Reviews can be deleted by users with delete privileges. The **Delete** button is displayed at the head of the record if the record is expanded, or in the summary line if the record is collapsed.

Locations Tab

The **Locations** tab allows the library to record information about sub-units for which the e-resource is licensed. A check box indicates whether the e-resource is licensed for the sub-unit.

Location data is made available to external systems via Verde SOAP.

The location record lists the valid institutions for the instance. When you click a line, an **Edit** button is automatically added to the line. This button opens the Allowed Location Note window, in which you can create and edit allowed location records if you have editing privileges.

When new licenses are created, the system uses the **Allowed locations** from the library record as the default allowed institutions. However, these values can be overwritten when the license is edited.

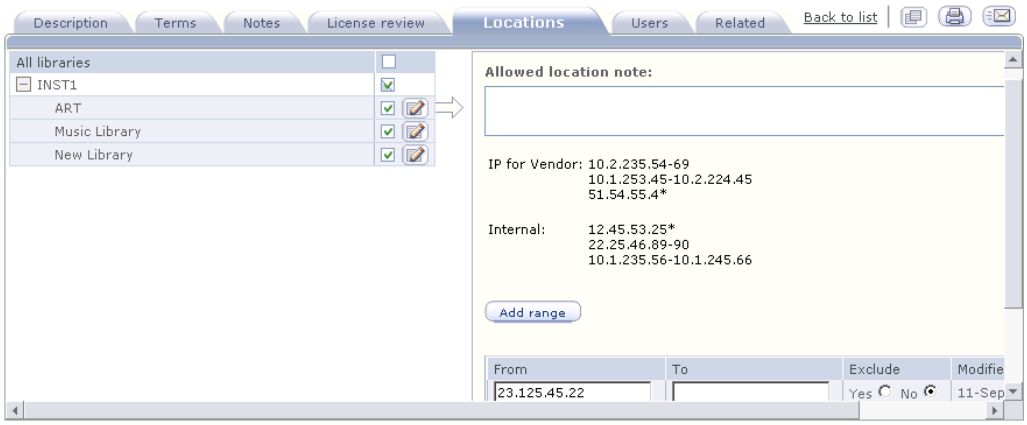

Figure 52: Locations

The IP for the library's vendor and internal IP are displayed in the **Allowed location note** box in read-only mode. Additional IPs can be added to the license using the **Add Range** button. These ranges can either be added to, or excluded from, the default IP ranges that are set in the library record using the **Yes/No** buttons in the **Exclude** column. The format of the IP range in the license is the same as its format in the library record.

Users Tab

The **Users** tab stores a site-defined list of user types. The list of user types is maintained by the local administrator in the Verde Admin module. The allowed user tables store the list of licensed user groups per e-resource. Each user group can be set to **Allowed** or **Not Allowed**. Users with editing privileges

can create and edit allowed user records. Allowed user information is provided to external systems via Verde SOAP services.

Figure 53: Users

Prevailing Term Records

A prevailing term record must be defined when there is more than one active license—direct or inherited—for an e-product.

Where there is more than one active license record (that is, licenses with overlapping time frames) for an e-product, an error message and an **Add Prevailing Terms** button are displayed in the License Records List.

Figure 54: Prevailing Term Records

A prevailing term record must then be defined (by clicking the **Add Prevailing Terms** button) in order to store the license terms that govern the e-product.

Prevailing term records have the same fields as license records, however the following differences exist:

- The license type is automatically defined as **Prevailing**.

- There are only two statuses: **Active** and **Inactive**

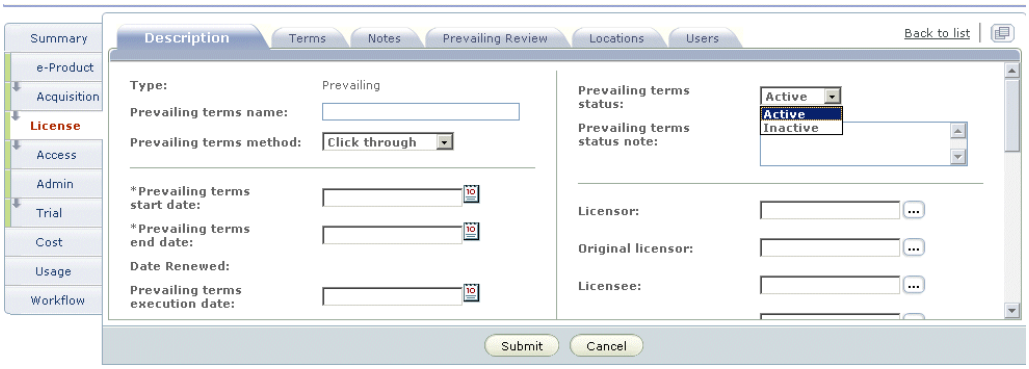

Figure 55: Prevailing Terms – Status

Note: Only users with editing privileges can create prevailing term records.

License Workflows

A Verde workflow for licensing is initiated when a trial has ended with the decision to purchase. See **Permissions** on page **159** for more information.

In addition, licenses can be managed using a combination of online and batch processes. The process for adding new licenses, as well as negotiating and approving them, is manual. The **Report of Active e-Products without Licenses** can be used to create a report of active e-products without licenses. The **General Report of e-Products** can be used to create a report of licenses with a particular statuses. In addition, you can locate e-products with a particular license status using the online search.

The **License renewal** type controls the manner in which licenses are renewed. The following rules govern license renewal:

- **Perpetual** licenses do not need to be renewed.
- **Automatic** licenses are renewed automatically when the acquisition record for the e-product is renewed.
- **Explicit Renewal** licenses must be renewed by clicking the **Renew** button. The **Renew** button is displayed above the license details when a license is renewable. Renewing a license extends the license end date by the license standard duration.

The Verde **License Renewal** task renews licenses that are about to expire. It also creates a report of licenses that have to be renewed explicitly and are up for renewal. The license renewal process uses the **Vendor advance notice** field in the license to determine when licenses should be reported for renewal.

11

Access Records

This section includes:

- **About Access Records** on page **119**
- **Access Records List** on page **119**
- **Access Details** on page **121**

About Access Records

Access records store information that is needed to access the electronic resource. This information includes access requirements, URLs, user names, and passwords.

Typically, access records are created for e-packages and e-standalones. However, it is also possible to create access records for e-interfaces and e-constituents.

Four types of access records can be defined:

- Web interface
- Z39.50
- XML
- SRW/SRU

Access Records List

The **Access Records List** contains a list of access protocols and links to the access record for each protocol. The icon in the first column indicates whether an access record exists for the e-product. An e-product can have only one access record for each access type. If an access record does not exist for an e-product, access information is inherited from the parent e-product.

Only protocol information applicable to the e-product is included in the access record.

There are three functions available from the Access Records List, you have the appropriate user privileges:

- Create new
- Edit
- Duplicate

The buttons for each function display only when relevant. If an access record does not exist, the **Create New** button is displayed. If a record does exist, the **Edit** and **Duplicate** buttons display. In addition, sets of access records can be copied and pasted between e-products and between instances. The **Copy** button is displayed above the Access Records List. Once there is an access record on the clipboard, the **Paste** button is displayed.

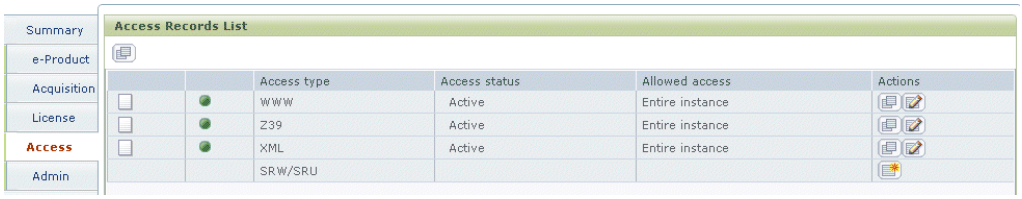

Figure 56: Access Records List

The Access Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the record's type
- the record's status
- whether or not the record is applicable to the entire instance
- buttons to perform the following actions:
  - create a new record
  - edit an existing record
  - duplicate a record

Access Details

The access record has two tabs: one containing general access information and the second containing access authorization details.

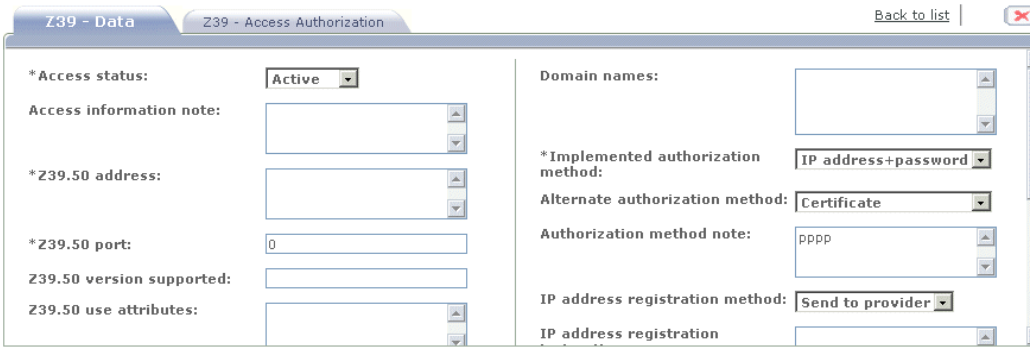

Figure 57: Access Details

General Access Information

In the **Data** tab, there are a number of URI fields that contain links. These fields are:

- For the WWW access type: **Primary access URI**, **Alternate URI**, **Local Persistent URI**
- For the SRW/ SRU access type: **Base URL**

After you click the **Submit** button, these fields became editable. Click the **Edit** button to edit these fields.

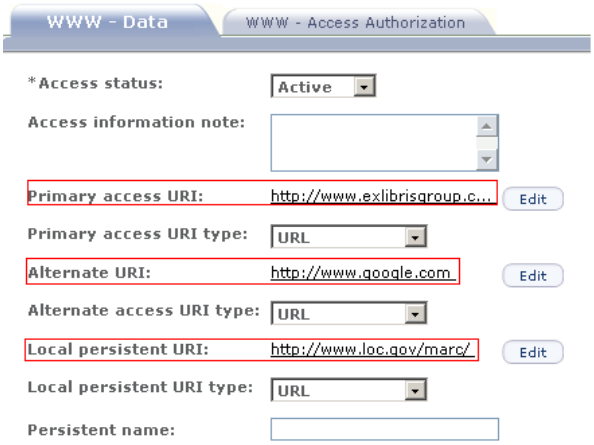

Figure 58: Access Details – Editing Links

List of Data Tab Fields

The following table describes the fields in the access record's **Data** tab.

Table 11. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Access status	ACCESS STATUS	All	Access status. The possible values are: **Active**, **Inactive**, and **Test**. These fields can be customized by modifying the code table.
Access information note	ACCESSINFO NOTE	All	Additional information pertaining to access issues and unusual situations, such as inaccessible or non-subscribed portions not marked as such at the site, unusual login/logoff requirements, local vs. remote authentication control, and navigation or accessibility features.
Domain names	DOMAIN NAMES	All	Any domain names associated with a given product. Some proxy servers require this information.
Implemented authorization method	IMPLAUT METHOD	All	The method by which access to the product is controlled. If the provider supports more than one access method, this element records the methods selected for use by the subscribing institution. The possible values are: ■ IP address ■ Password ■ IP address+ password ■ Script ■ Certificate ■ Unrestricted ■ Other These fields can be customized by modifying the code table.

Table 11. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Alternate authorization method	ALTERNATE AUTMETHOD	All	Additional authorization methods available for the product. The possible values are: ■ IP address ■ Password ■ IP address+ password ■ Script ■ Certificate ■ Unrestricted ■ Other These fields can be customized by modifying the code table.
Authorization method note	AUTMETHOD NOTE	All	Additional information pertaining to the authorization method.
IP address registration method	IPADDRESS REGMETHOD	All	The method by which IP addresses are sent to the product provider. The possible values are: **Online** and **Provider**. These fields can be customized by modifying the code table.
IP address registration instructions	IPADDRESS REG INSTRUCTION	All	The URI at which IP addresses are registered, the email address or contact role to which updates are sent, or other relevant instructions.
IP address general note	IPADDRESS GENERAL NOTE	All	Additional notes pertaining to IP address information.
Access record ID	ACCESSCODE	All	The access code.
Creation date	CREATION DATE	All	The date on which the access record was created.

Table 11. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
By	CREATEDBY	All	Verde user. Contains the ID of the staff person who created the admin record.
Latest update	UPDATEDATE	All	The date on which the access record was updated.
By	UPDATEDBY	All	Verde user. Contains the ID of the staff person who created the admin record.
Primary access URI	WWW_ PRIMARY ACCESSURI	WWW	The method of access, the location, and the file name of an e-product.
Primary access URI type	WWW_ PRIMARY ACCESSURI TYPE	WWW	The type of URI being used to locate and identify the product. The possible values are: ■ URL ■ URN ■ Undetermined These fields can be customized by modifying the code table.
Alternate URI	WWW_ ALTERNATE URI	WWW	An alternate URI available for access to an identical or alternate version of the resource. To be used when the primary URI is compromised or unavailable. Examples include URLs for mirror sites, URLs that provide access to a resource via a different provider, and so forth.
Alternate access URI type	WWW_ ALTERNATE URITYPE	WWW	The type of alternate URI being used. The possible values are: ■ URL ■ URN ■ Undetermined These fields can be customized by modifying the code table.

Table 11. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
Local persistent URI	WWW_LOC PERSISTENT URI	WWW	A persistent URI that is created locally to access the product.
Local persistent URI type	WWW_LOC PERSISTENT URITYPE	WWW	The type of locally created URI. The possible values are: ■ URL ■ URN ■ Undetermined These fields can be customized by modifying the code table.
Persistent name	WWW_ PERSISTENT NAME	WWW	Persistent name.
Z39.50 address	Z39_ADDRESS	Z39	Address used to provide Z39.50 access.
Z39.50 port	Z39_PORT	Z39	Port used to provide Z39.50 access.
Z39.50 version supported	Z39_VERSION SUPPORTED	Z39	Z39.50 version supported.
Z39.50 use attributes	Z39_ ATTRIBUTES	Z39	Attributes necessary to activate Z39.50 access.
Z39.50 information from vendor	Z39_URLINFO	Z39	Z39.50 information from vendor.
Z39.50 database name – long	Z39_Z39DB LONGNAME	Z39	Long database name necessary to enable Z39.50 access.
Z39.50 database name – short	Z39_Z39DB SHORTNAME	Z39	Short database name necessary to enable Z39.50 access.
Z39.50 note	Z39_NOTE	Z39	Additional information about Z39.5 access.
Base URL	XML_BASE URL	XML	Base URL.

Table 11. Data Tab Fields

Field Name	Code	Relevant Access Type	Description
XML port	XML_PORT	XML	XML port.
Link to DTD	XML_SRW_ LINKTODTD	XML, SRW/ SRU	Link to DTD.
DTD note	XML_SRW_ DTDNOTE	XML, SRW/ SRU	DTD note.
URL to XML information from vendor	XML_SRW_ URLINFO	XML, SRW/ SRU	URL to XML information from vendor.
XML gateway note	XML_NOTE	XML	XML gateway note.
SRW/SRU	SRW_SRWSRU	SRW/SRU	There are two possible values: **SRW** and **SRU**.
Base URL	SRW_BASE URL	SRW/SRU	Base URL.
SRW/SRU port	SRW_PORT	SRW/SRU	SRW/SRU port.
SRW/SRU version supported	SRW_ VERSION SUPPORTED	SRW/SRU	SRW/SRU version supported.
SRW/SRU attributes	SRW_ ATTRIBUTES	SRW/SRU	SRW/SRU attributes.
SRW/SRU note	NOTE	SRW/SRU	Additional information about SRW/SRU access.

Access Authorization

The **Access Authorization** tab allows the library to record information about the sub-units to which the e-resource has access. If a sub-unit's check box is selected, the e-resource is available for the sub-unit.

The access authorization record lists the valid institutes for the instance. When you select an institute, an **Edit** button is displayed for the institute. Clicking this button opens the access authorization pop-up window, in which you can create and edit access authorization records if you have editing privileges.

When new access records are created, the system uses the access authorization values from the library record as the default access authorization values. These

default values can be overwritten when the access authorization record is edited.

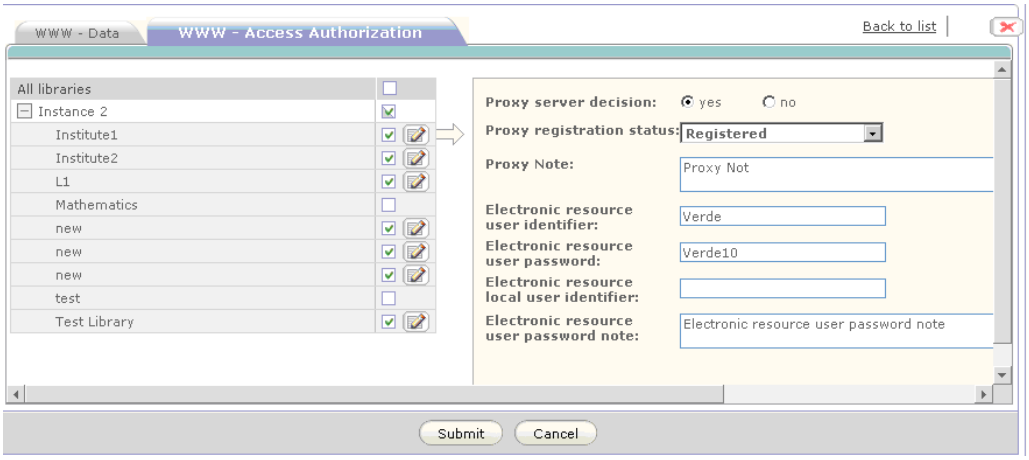

Figure 59: Access Authorization

12

Admin Records

This section includes:

- **About Admin Records** on page **129**
- **Admin Records List** on page **129**
- **Admin Details** on page **130**

About Admin Records

The administrative record stores information about the tools provided by the electronic resource to administer an e-product. The administrative record also stores the user name and password information that is needed to access an e-product's administration module.

Typically, administrative records are created for e-interfaces, as the information is usually common for all e-products available from the e-interface. However, they can be created at any level.

Admin Records List

The **Admin Records List** displays the admin record for a particular e-product. If there is no admin record for an e-product, the e-product's parent admin record is inherited. An admin record can be inherited from any level, e-package or e-interface. Typically, admin records are maintained on the level of the e-package or e-interface. The **New Admin** button is displayed at the top of the list if no admin record exists; if a record does exist, this button does not display. The **Open Admin** button is displayed in the **Actions** column.

The Admin Records List displays the following information for each record:

- whether the record is the parent record or the inherited record

- if the record is currently active
- the code of the admin record
- the level of the e-product type for which the record exists
- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited

Figure 60: Admin Records List

Admin Details

The admin record contains four tabs:

- **Admin** – For details, see **Admin Tab** on page **131**.
- **Local Admin** – For details, see **Local Admin Tab** on page **137**.
- **Incidents** – For details, see **Incidents Tab** on page **138**.
- **Breaches** – For details, see **Breaches Tab** on page **140**.

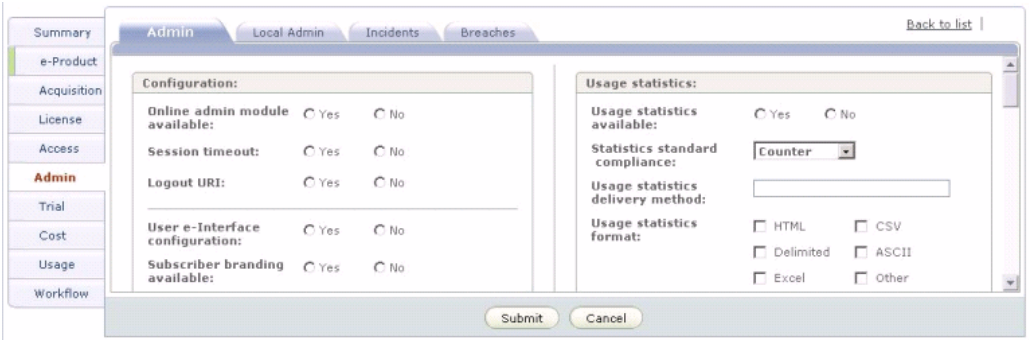

Figure 61: Admin Details

To the right of the tabs, the following four buttons are available:

- **Delete** – Enables you to delete the record, if you have the required permissions.
- **Copy e-Product Admin** – Enables you to copy the record.
- **Print** – Enables you to print the record.
- **Send E-Mail** –Enables you to send the record via e-mail.

Note: There are no mandatory fields in the admin record. You may define field values as required.
Each **Note** field is 500 characters long.

Admin Tab

The **Admin** tab consists of three sub-sections:

- **Configuration** – This section covers all aspects related to configuration, such as user interface configuration, branding, and Z39.50 support.

  Note the following:

  - If you select **Yes** for **Online admin module available**, an additional field is displayed, enabling you to input the admin URI.
  - If you select **Yes** for **Session timeout**, a box opens, enabling you to enter the timeout value (in minutes).
  - If you select **Yes** for **Logout URI**, an additional field is displayed, enabling you to enter the logout URI value.
- **Usage statistics** – This section contains fields describing elements related to usage statistics, such as availability, frequency, and format.
- **Support** – This section lists all the fields pertaining to support, such as hard and software requirements, training information, and user documentation.

  There are three URI fields that contain links:

  - **Admin URI**
  - **Logout URI value**
  - **Provider system status URI**

  After you click the **Submit** button, these fields became editable. Click the **Edit** button to edit these fields.

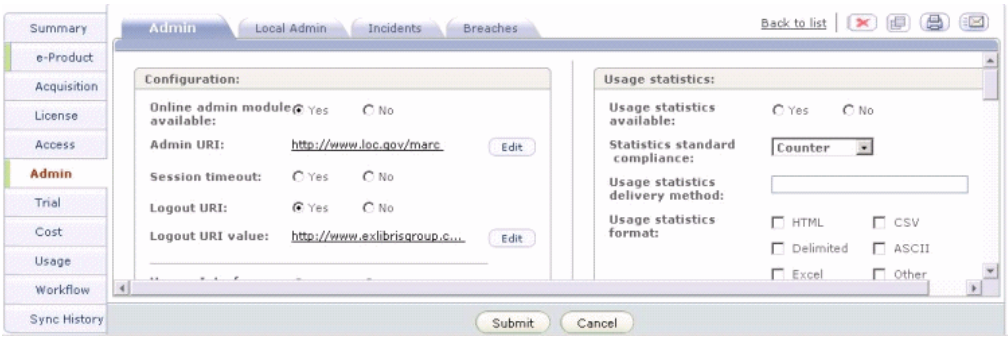

Figure 62: Admin Details – Editing Links

List of Admin Tab Fields

The following table describes the fields in the admin record's **Admin** tab.

Table 12. Admin Tab Fields

Field Name	Code	Description
Online admin module available	ONLINEADMIN	Denotes whether resource attributes can be directly modified online by the subscribing institution. Possible values are: **Yes**, **No**.
Admin URI	ONLINEADMINURI	The URI of the online administration module. The field is available if the value of **Online admin module available** is **Yes**.
Session timeout	SESSIONTIMEOUT	Indicates whether there is a configurable inactivity timeout. Possible values are: **Yes**, **No**.
Session timeout value	SESSIONTIMEOUTVALUE	The inactivity timeout used for the resource. The field is available if the value of **Session timeout** is **Yes**.
Logout URI	LOGOUTURI	Indicates whether a logout URI can be specified. Possible values are: **Yes**, **No**.
Logout URI value	LOGOUTURIVALUE	The logout URI used with the resource. The field is available if the value of **Logout URI** is **Yes**.
User e-Interface configuration	UICONFIGURATION	The ability to control user interface features. Possible values are: **Yes**, **No**.
Subscriber branding available	SUBSCRIBERBRANDING	Indicates whether a branding feature is available. Possible values are: **Yes**, **No**.
Subscriber branding activated	SUBSCRIBERBRANDINGACTIVSTATUS	Indicates whether branding has been activated. Possible values are: **Yes**, **No**.

Table 12. Admin Tab Fields

Field Name	Code	Description
Subscriber branding note	SUBSCRIBERBRANDINGNOTE	Subscriber branding note.
Personalization services available	PERSONALIZATION SERVICES	Indicates whether alerting and other personalization features are available. Possible values are: **Yes**, **No**.
Z39.50 supported	Z3950	Indicates the ability of the interface of the resource to support z39.50. Possible values are: **Yes**, **No**.
Hook to holdings	HOOKTOHOLDINGS	A link to library holdings is available. Possible values are: **Yes**, **No**.
Holdings activated	HOLDINGSACTIVATED	The activation of a link to library holdings. Possible values are: **Yes**, **No**.
Provider reference linking available	PROVIDERREFERENCE LINKING	The availability of links to external content created by the provider of the resource. Possible values are: **Yes**, **No**.
Inbound linking indicator	INBOUNDLINKING INDICATOR	The availability of a link to internal stable locations within a product. Possible values are: **Yes**, **No**.
Inbound linking activation status	INBOUNDLINKING ACTIVATIONSTATUS	The activation of a link to internal stable locations within a product. Possible values are: **Yes**, **No**.
OpenURL compliant	OPENURLCOMPLIANT	The ability of the electronic product and its content to be Open URL compliant. Possible values are: **Yes**, **No**.
OpenURL activation status	OPENURLACTIVATION STATUS	The activation of external links. Possible values are: **Yes**, **No**.

Table 12. Admin Tab Fields

Field Name	Code	Description
Linking note	LINKINGNOTE	Information about external linking—for example, implementation details or other notes
MARC record availability	MARCRECORD AVAILABILITY	The availability of MARC records for the resource. Possible values are: **Yes**, **No**.
MARC record note	MARCRECORDNOTE	Further information regarding the availability of MARC record sets—for example, free or purchased, acquisition and implementation status, and so forth. Possible values are: **Yes**, **No**.
Interface languages availability	INTERFACELANGUAGESA VAILABILITY	The availability of multiple languages for the Interface. Possible values are Yes, No.
Interface languages implemented	INTERFACELANGUAGE IMPLEMENTED1- 3	The activation of one or more interface languages. The field is available if the value of **Interface languages availability** is **Yes**.
Usage statistics available	AVAILABLE	The availability of usage statistics for the resource. Possible values are: **Yes**, **No**.
Statistics standard compliance	STATISTICSSTANDARD COMPLIANCE	The official standard to which the statistics conform. Default values are COUNTER and ICOLC 1998. These fields can be customized by modifying the code table.
Usage statistics delivery method	DELIVERYMETHOD	The manner in which statistics are made available.

Table 12. Admin Tab Fields

Field Name	Code	Description
Usage statistics format	FORMATHTML FORMATDELIMITED FORMATEXCEL FORMATPDF FORMATCVS FORMATASCII FORMATOTHER	The formats in which statistics are made available. The following formats are available: ■ HTML ■ Delimited ■ Excel ■ PDF ■ CSV ■ ASCII ■ Other
Usage statistics frequency	FREQUENCY	The frequency with which statistics are made available. The possible values are: ■ Annual ■ Bi-annual ■ Monthly ■ Quarterly ■ User-selectable These fields can be customized by modifying the code table.
Usage statistics online location	ONLINELOCATION	The online location at which statistics can be accessed, such as a URL or file path.
Usage statistics delivery addressee	DELIVERYADDRESS	Library contact name.
Usage statistics note	NOTE	Other information regarding usage statistics.
Usage statistics locally stored	LOCALLYSTORED	Information about and/or links to locally stored data.

Table 12. Admin Tab Fields

Field Name	Code	Description
Hardware requirements – internal	HARDWAREREQUIREMENTSPRIVATE	Information about hardware requirements and restrictions – internal.
Hardware requirements – public	HARDWAREREQUIREMENTSPUBLIC	Information about hardware requirements and restrictions – public.
Software requirements –- internal	SOFTWAREREQUIREMENTSPRIVATE	Information about software requirements – internal.
Software requirements – public	SOFTWAREREQUIREMENTSPUBLIC	Information about software requirements – public.
Maintenance window value	MAINTENANCEWINDOWVALUE	The provider's regularly scheduled downtime window for this product. The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.
Provider system status URI	PROVIDERSYSTEMSTATUSURI	The URI at which the provider posts system status information.
Provider system status URI type	PROVIDERSYSTEMSTATUSURITYPE	The type of URI used to post system status information. The following options are available: ■ URL ■ URN
Local performance monitoring note	LOCALPERFORMANCEMONITORINGNOTE	Information concerning Web sites or programs that carry out local performance monitoring.
Incident log	INCIDENTLOG	A log of downtime and problem reports and their resolution.

Table 12. Admin Tab Fields

Field Name	Code	Description
Training information	TRAININGINFORMATION	Information regarding the availability of special training, such as instructions on how to bypass simultaneous user restrictions. May also include training contact names and other general information.
Administrative documentation	ADMINDOCUMENTATION	Information about and/or location of documentation available for product administrators.
User documentation	USERDOCUMENTATION	Information about and/or location of documentation available for end users
Administrative ID	ID	Admin ID. Unique. Not null.
Creation date	CREATIONDATE	Date record created. Automatically generated by Verde.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the admin record.
Latest update	UPDATEDATELOCAL	The date on which the record was updated in Verde.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the admin record.

Local Admin Tab

In the **Local Admin** tab, any number of local usage records can be defined. New records are created by clicking the **Add Local Admin** button.

Once a record has been created, it can be expanded or collapsed using the + or – (plus or minus) buttons to the left of the record. If more than one local record

exists, all records can be expanded or collapsed by clicking the **Expand All** or **Collapse All** button. Click the record's **Delete** button to delete the record.

Figure 63: Local Admin

Incidents Tab

In the **Incidents** tab, you can view all incidents in which the e-product did not performed as expected that were reported by the library to the e-product supplier/vendor.

Any number of incident records can be defined. Once a record has been created, the user can edit, view, update, or delete the record. New incident records can be created by clicking the **New** button in the Incidents tab. Alternatively, you can create a new incident record by copying and modifying another record.

Incident type, Status, and **Organization** are mandatory fields. If you click the ellipsis to the right of the **Organization** field, the List of Organizations window opens, displaying a list of defined organizations that you can filter by role.

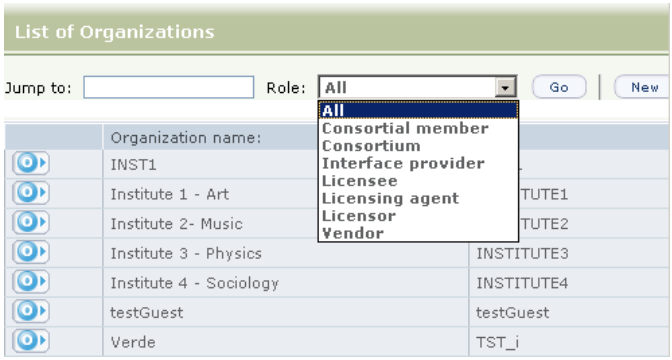

Figure 64: List of Organizations

Note: If an organization is missing from the List of Organizations window, you can add the organization by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.

If you click the ellipsis to the right of the **Contact** field, the List of Contacts window opens, displaying a list of defined contacts that you can filter by role.

Figure 65: List of Contacts

If there is more than one incident record, the records can be sorted by date, title, status, and type.

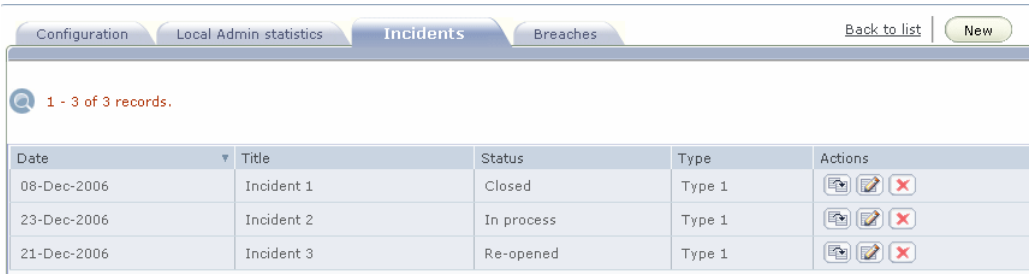

Figure 66: Incident Record

Incidents can be linked to only one e-product . The e-product can be of any type except e-print. An e-product, however, can have more than one incident.

When adding a new incident record, note the following:

- The **Occurred date** and **Reported date** fields are populated with the current date. These dates may be modified as necessary.
- **Incident type**, **Status**, and **Organization code** fields are mandatory fields. The first two can be pre-defined to contain a library-defined value by default.
- Once the record has been submitted, the following fields are automatically updated as well:
  - **Incident code**
  - **Creation date, by**
  - **Latest update, by**

Breaches Tab

In the **Breaches** tab, you can view breach records, which are incidents that a vendor reports to the site (library) if the site has not complied with license terms.

As with the incident records, any number of breach records can be defined. Once a record has been created, you can edit, view, update, or delete the record. New breach records can be created by clicking the **New** button in the Breaches tab. Alternatively, you can create a new breach record by copying and modifying another record.

Breach type, **Status**, and **Organization** are mandatory fields. If you click the ellipsis to the right of the **Organization** field, the List of Organizations window opens, displaying a list of defined organizations that you can filter by role.

Note: If an organization is missing from the List of Organizations window, you can add the organization by clicking the **New** button, entering the appropriate details in the Create New Organization pop-up window, and clicking **Submit**.

If you click the ellipsis to the right of the **Contact** field, the List of Contacts window opens, displaying a list of defined contacts that you can filter by role.

If there is more than one breach record, the records can be sorted by date, title, status, and type.

Breach records can be linked to only one e-product . The e-product can be of any type except e-print. An e-product, however, can have more than one breach record.

When adding a new breach record, note the following:

- The **Occurred date** and **Reported date** fields are populated with the current date. These dates may be modified as necessary.
- **Breach type**, **Status**, and **Organization code** fields are mandatory fields. The first two can be pre-defined to contain a library-defined value by default.

- Once the record has been submitted, the following fields are automatically updated as well:
  - **Breach code**
  - **Creation date, by**
  - **Latest update, by**

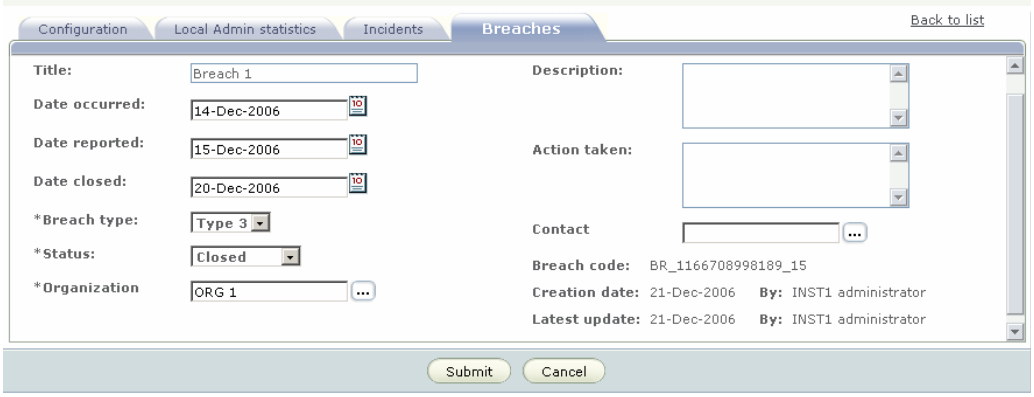

Figure 67: Breach Record

13

Trial Records

This section includes:

- **About Trial Records** on page **143**
- **Trial Records List** on page **144**
- **Trial Details** on page **144**
- **Trial Workflow** on page **148**

About Trial Records

The trial record stores the information necessary to manage a trial for an e-product, including the length of the trial, the trial participants, to whom the resource is available during the trial, whether the trial is licensed, and the trial decision.

Typically, trial records are created for an e-package. However, it is also possible to create trial records for e-interfaces and e-standalones.

The trial workflow includes both online and batch processes. There are two Verde tasks—sending alerts to trial participants and managing trials—that relate only to trials.

Trials can be conducted on active or inactive e-products. If the trial is conducted on an e-product that is already active, the only field in the e-product that is automatically updated is the **Selection status**. If the trial is conducted on an e-product that is not active, data from the trial is automatically updated by the e-product. The trial start and end dates are taken from to the e-product's **Active from** and **Active to** dates and the license's start and end dates. When a trial is over, if the decision is not to buy the e-product, the e-product is rejected and the license retired.

Note: The trial record contains information necessary to manage the trial only. Access information is managed in the access record, e-product definitions are set in the e-product record and, if a license is required, the license terms are stored in the license record.

Trial Records List

The **Trial Records List** displays the list of trials that have been run on a particular e-product.

The Trial Records List displays the following information for each record:

- whether the record is the parent record or the inherited record
- if the record is currently active
- the date on which the trial starts
- the date on which the trial ends
- the trial status
- the decision regarding the e-product that is on trial
- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited.

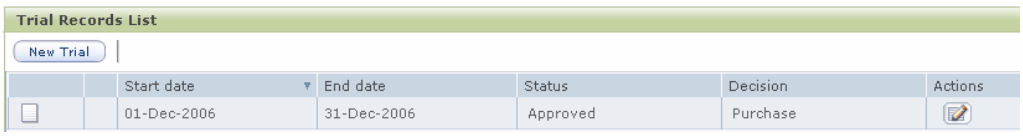

Figure 68: Trial Records List

Trial Details

The trial record contains two tabs:

- **Details** – Contains data related to the trial.

- **Participants** – Enables you to add the trial participants. Note that trial participants cannot be added until the trial record is submitted and saved on the server.

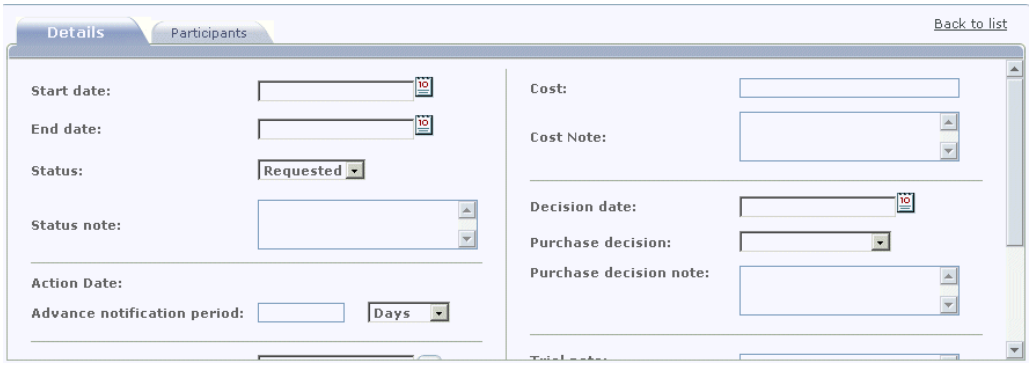

Figure 69: Trial Details

List of Details Tab Fields

The following table describes the fields in the trial record's **Details** tab.

Table 13. Details Tab Fields

Field Name	Code	Description
Start date	STARTDATE	The date on which the trial begins or on which the product becomes available.
End date	ENDDATE	The date on which the trial ends or on which the product will no longer be accessible unless acquired.
Status	STATUSCODE	The possible values are: ■ Approved ■ On hold ■ On trial ■ Requested ■ Trial over These fields can be customized by modifying the code table.
Status note	STATUSNOTE	The notes about the trial.

Table 13. Details Tab Fields

Field Name	Code	Description
Advance notification period	TICKLERPERIOD TICKLERPERIOD MODECODE	The advance notice interval required by the library to warn of an upcoming trial end date. The default values are: **Days**, **Months**, and **Weeks**. These fields can be customized by modifying the code table.
Contact	ORGCONTACT CODE	Organization contact. Points to the **Name** field in the **Organizationcontacts** table.
Available to public	AVAILABLETO PUBLIC	An indication of the availability of the trial product to the public.
License required	LICENSEREQUIRED	Indicates whether a license is required for the product's trial period.
Activate SFX	ACTIVATESFX	Indicates whether to activate SFX for the product's trial period. Currently not functional.
Cost	COST	The cost of the trial.
Cost note	COSTNOTE	A note about the cost.
Decision date	DECISIONDATE	The date on which the trial decision is made.
Purchase decision	DECISIONSTATUS CODE	The possible values are: ■ Deferred ■ Do not purchase ■ Null ■ Purchase These fields can be customized by modifying the code table.
Purchase decision note	DECISIONNOTE	The notes about the purchase decision.
Trial note	NOTE	Notes about the trial.
Trial code	TRIALCODE	The trial code.
Creation date	CREATEDDATE	The date on which the trial was created.

Table 13. Details Tab Fields

Field Name	Code	Description
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the trial record.
Latest update	UPDATEDATE	The date on which the trial was updated.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the trial record.

Creating a New Trial Record

You can create new trial records for e-packages, e-standalones, and e-interfaces only.

Note: Only users with edit privileges can create new trial records.

To create a new trial record:

1. Select an e-package, e-standalone, or e-interface.
2. In the left menu, select **Trial**.
3. In the Trial Records List, click the **New Trial** button.
4. Complete the fields displayed in the **Details** tab. Note the following:
   - If you select the status **Requested**, there are no mandatory fields.
   - If you select the status **Approved** or **Trial Over**, the following fields are mandatory:
     - **Start date** and **End date**
     - **Available to public**
     - **License required**
     - **Decision date**
5. Click **Submit**. The new trial record is displayed in the Trial Records List.

Editing a Trial Record

To edit an existing trial record, from the **Actions** column of the Trial Records List, click the **Edit** button.

Only users with editing privileges can edit an existing trial record. Once a trial record has a status of **On Trial**, it cannot be edited.

Deleting a Trial Record

Trial records can be deleted only when the trial status is **Requested** or **On Hold**. Other trial statuses prevent the trial record from being deleted.

Trial Workflow

When a request is made to run a trial on a particular e-resource, you should create a trial record and assign the status **Requested** to the record. Negotiations begin at this point and the trial record gets completed as the process progresses.

Note: Trials cannot be run on e-constituents. They can be run on e-packages, e-standalones, and e-interfaces only. When a trial is run on an e- package or e-interface, all lower-level records are automatically included in the trial.

By the time a trial has been approved, the following information must be completed in the trial record:

- **Start date** and **End date**
- **Available to public**
- **License required**
- **Decision date**

In addition, it is recommended that you add trial participants. Trial participants are notified of changes to the trial record, including changes to the trial's start and end dates, as well as the registering of a trial decision. In addition, trial participants are notified of the trial's completion before the trial is over. You set the period of advance notification in the **Advance notification date** field. The e-mail sent to participants includes a link to an external feedback page so that

trial participants can enter their feedback directly, without having to log in to Verde.

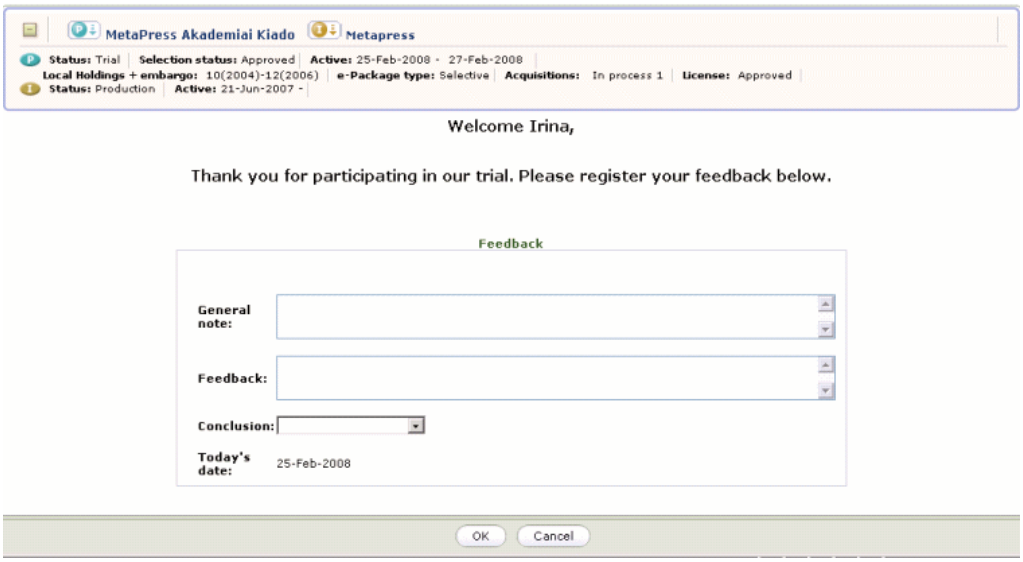
MetaPress Akademiai Kiado
Metapress
Status: Trial | Selection status: Approved | Active: 25-Feb-2008 - 27-Feb-2008
Local Holdings + embargo: 10(2004)-12(2006) | e-Package type: Selective | Acquisitions: In process 1 | License: Approved
Status: Production | Active: 21-Jun-2007 -
Welcome Irina,
Thank you for participating in our trial. Please register your feedback below.
Feedback
General note:
Feedback:
Conclusion:
Today's date:
25-Feb-2008
OK
Cancel

Figure 70: External Feedback Form

Note: The **General note** and **Feedback** fields may include up to 2000 characters each.

If a trial participant completed the form and then reopened the link, the feedback that already exists is displayed. Note that only one feedback record per trial participant can be saved in a trial record. If a trial participant updates the feedback form, the latest updated feedback is saved.

Starting a Trial

Once a trial has been approved and a trial status of **Approved** has been assigned to the trial record, the trial management process updates the trial status to **On Trial** on the trial start date. Trial participants are alerted that the trial has begun. The e-products that are on trial are all active for the duration of the trial. They have an e-product status of **Trial**, a selection status of **Evaluation**, and **Activation from** and **Activation to** dates that correspond to the trial start and end dates.

Note: Trials that require licenses cannot become active until there is an approved license.

Trial Over

A trial is over when access to the e-product is no longer available. At this point, the trial management process updates the trial record to **Trial Over**. The trial decision need not be registered until the purchase decision due date is reached. When the trial is over, e-products become inactive and the trial license is retired.

Decision Made

When the decision is registered, trial participants are alerted to the decision. If the decision is to purchase the e-product, the selection status of the e-product is updated to **Approved**.

If the decision is to defer, a purchase decision of **Deferred** can be assigned. At the same time, be sure to update the decision due date. The decision due date is used to alert you that a decision is due for the trial record.

14

Cost Records

This section includes:

- **About Cost Records** on page **151**
- **Cost Records List** on page **151**
- **Cost Record Fields** on page **153**

About Cost Records

Cost records contain data that describes the various types of costs associated with an e-product and are intended for use in collection development decision making. Cost records can contain many cost types, including the total amount that was paid for a particular e-product for a particular period of time, the invoiced price, and the vendor price.

A cost record includes fields for storing specific information about the payment, such as budget or fund name, check number, or invoice number. Multiple cost records can be linked to a single e-product.

Unlike the invoice that is linked to an acquisition record, cost records are linked directly to e-products. This means that while the invoice is entered for an entire e-package, cost records can be entered for individual e-constituents.

Cost Records List

The **Cost Records List** displays all of the cost records for a particular e-product. The list is sorted in reverse chronological order.

The Cost Records List displays the following information for each record:

- the cost type
- the payment date

- whether the amount is a credit or debit
- the payment amount
- buttons that enable the following actions:
  - editing the record, if you have editing privileges and the record is not inherited
  - copying the record to the same e-product

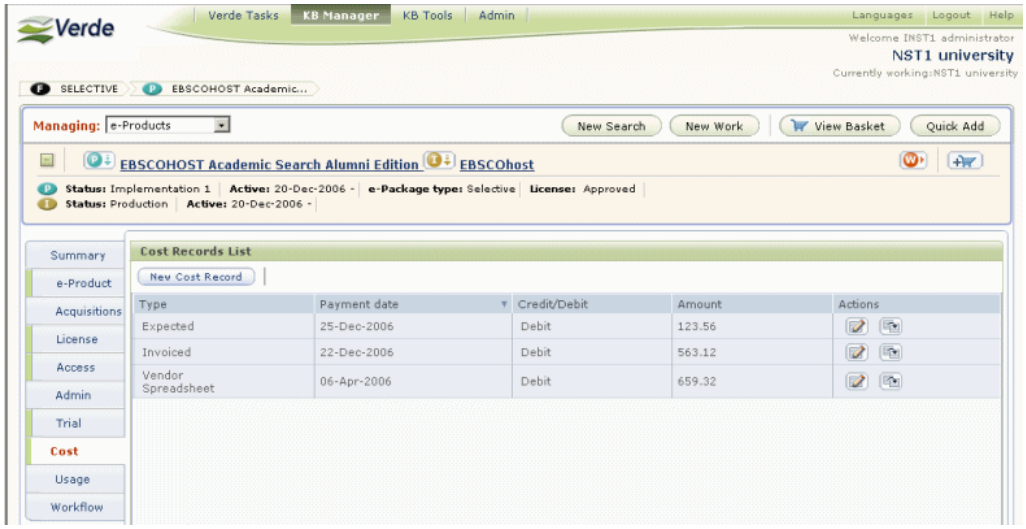

Figure 71: Cost Records List

To create a new cost record, click the **New Cost Record** button. The Details tab opens, enabling you to define values for the cost record fields. After you click **Submit**, the record is displayed in the Cost Records List.

Cost Record Fields

The following table describes the fields in the cost record's **Details** tab.

Table 14. Details Tab Fields

Field Name	Code	Description
Cost type	COSTTYPE	The possible values are: ■ Expected ■ Invoiced ■ List ■ Print ■ Vendor Spreadsheet These fields can be customized by modifying the code table.
Vendor name	VENDORNAME	Organization name. Points to the **Name** field of the **Organizationame** table.
Credit/Debit	AMOUNTUNITTYPE	There possible values are: **Debit** and **Credit**.
Amount	AMOUNTVALUE	Cost amount.
Payment period from	PAYMENTPERIOD FROM	The date on which the payment period begins.
Payment period to	PAYMENTPERIOD TO	The date on which the payment period finishes.
Payment date	PAYMENTDATE	The date of payment.
Payment made by	PAYMENTMADEBY	The name of person by whom the payment was made.
Consortial purchase	CONSORTIAL PURCHASE	Indicates a consortia purchase. Possible value are: **Yes** or **No**.
Percentage of total	PERCENTAGEOF TOTAL	If there is a consortia purchase, indicates the percentage of participation for your instance.
Cost code	COSTCODE	System-generated identifier.
Acquisitions No	ORDERNO	Acquisitions number of related acquisition record.

Table 14. Details Tab Fields

Field Name	Code	Description
Invoice No	INVOICENO	Invoice number of related invoice record.
Subscription No	SUBSCRIPTIONNO	Subscription number of related subscription.
Cost note	COSTNOTE	Additional information about cost.
Cost ID	ID	Cost ID. Unique identifier.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the cost record.
Creation date	CREATEDDATE	The date on which the cost record was created.
Latest update	UPDATEDATE	The date on which the cost record was updated.
By	UPDATEDBY	Verde user. Contains the ID of the staff person who updated the cost record.

15

Usage Records

This section includes:

- **About Usage Records** on page **155**
- **Usage Records List** on page **155**
- **Usage Record Fields** on page **156**

About Usage Records

Usage records store usage statistics that have been generated by other systems, such as vendor systems, linking software, and IT departments. Verde itself does not produce usage statistics. The usage record is based on the COUNTER schema.

Usage records can be linked to any type of e-product.

Usage Records List

The **Usage Records List** displays the usage records for a particular e-product. The usage records are displayed in chronological order.

The Usage Records List displays the following information for each record:

- the usage record number
- the type of usage report generated
- the start (sortable) and end periods of the usage report
- the library from which the statistics were gathered

- a button in the Actions column that enables you to edit the record, if you have editing privileges and the record is not inherited.

Usage Records List
New Usage Record
Report type Period from Period to Library Actions
1 Abstracts 01-Mar-2005 14-Mar-2006 christine2

Figure 72: Usage Records List

To create a new usage record, click the **New Usage Record** button. The Details tab opens, enabling you to define values for the usage record fields. After you click **Submit**, the record is displayed in the Usage Records List.

Usage Record Fields

The following table describes the fields in the usage record's **Details** tab.

Table 15. Details Tab Fields

Field Name	Code	Description
Period from	FRMPERIOD	Mandatory field. The date on which the usage period begins.
Period to	TOPERIOD	Mandatory field. The date on which the usage period finishes.
Number	UNUMBER	Mandatory field. The number of the usage record.

Table 15. Details Tab Fields

Field Name	Code	Description
Report/ Page type	REPORTTYPE	Usage report type. The possible values are: ■ Abstracts ■ Full text requests ■ Full-text HTML requests ■ Full-text PDF requests ■ Full-text postscript requests ■ Full-text total requests ■ References ■ Searches ■ Sessions ■ Turnaways These fields can be customized by modifying the code table.
Institution	INSTITUTECODE	The library that accesses the e-product if the usage is limited to one library. Points to the **ORGANIZATIONCODE** field in the **ORGANIZATION** table.
Usage summary note	USAGESUMMARY	Additional information about usage.
Usage record type	RECTYPECODE	The format that is used by the vendor for usage reports. The possible values are: ■ Counter ■ Other ■ Local These fields can be customized by modifying the code table.

Table 15. Details Tab Fields

Field Name	Code	Description
Counter level	COUNTERLEVEL	If a usage report received from a vendor is in Counter format, specify the **Counter level**. The possible values are: ■ Level 1 ■ Level 2 These fields can be customized by modifying the code table.
Vendor	VENDORCODE	The vendor who provides the usage report. Points to **ORGANIZATIONCODE** field in the **ORGANIZATION** table.
Report timestamp	REPTIMESTMP	Not in use.
Report ID	REPID	Not in use.
Ips	IPS	Not in use.
Usage ID	ID	Usage ID. A unique identifier generated by Verde.
Creation date	CREATIONDATE	The date on which the usage record was created.
By	CREATEDBY	Verde user. Contains the ID of the staff person who created the usage record.
Latest Update	LATESTDATE	Verde user. Contains the ID of the staff person who updated the usage record.
By	LATESTBY	The date on which the usage record was updated.

16

Workflows

This section includes:

- **About Verde Workflows** on page **159**
- **License and Acquisitions Workflows** on page **160**
- **Renew Acquisitions and Review e-Product Workflows** on page **161**

About Verde Workflows

There are three workflow options available in Verde:

- License
- Acquisitions
- Renew acquisitions and review e-product

You can choose which of the above workflows you want to use.

A fixed number of site-specific tasks that are built into each workflow. You can activate and rename all or part of these tasks.

For more information about site-specific tasks, refer to the *Workflows Configuration Guide*.

Permissions

There are three user permissions that relate to workflows:

- **Handle workflow**, which controls whether a user can view and update workflows and their tasks
- **Start workflow**, which controls whether a user can initiate a new workflow
- **Cancel workflow**, which controls whether a user can cancel a workflow that is in process

Without **Handle workflow** permissions, you cannot start or cancel workflows. **Handle workflow** permissions must therefore be assigned together with **start** and **cancel workflow** permissions.

License and Acquisitions Workflows

When the **Purchase decision** field of a trial record is updated to **Purchase**, it triggers the creation of two workflows: **License** and **Acquisitions**.

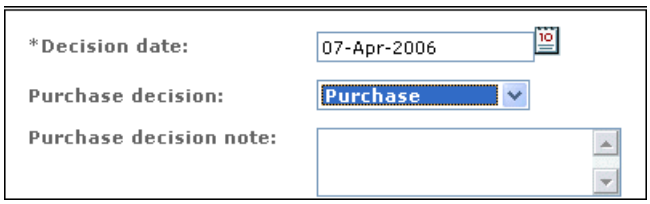

Figure 73: Purchase Decision Status – Purchase

If these are the first workflows created for the e-product, a green bar is added to the left of the **Workflow** menu option, indicating that the e-product now has workflow records.

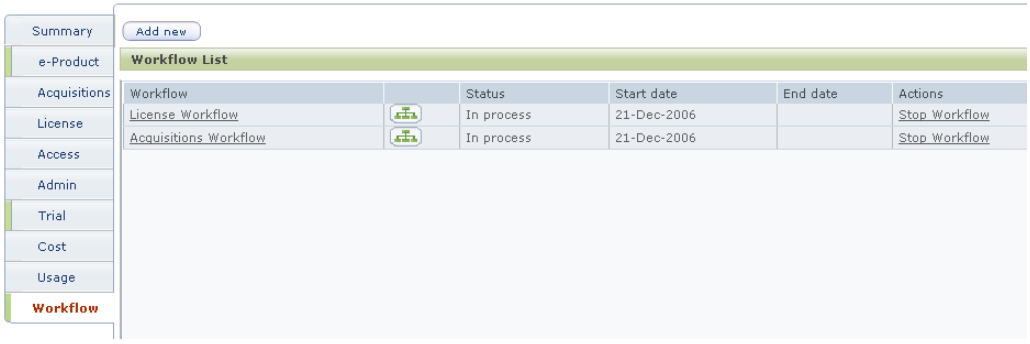

Figure 74: License and Acquisitions Workflows

If you access the e-product's License or Acquisitions tab, a **Workflow** icon is displayed. This icon indicates that there is a workflow linked to the e-product record.

Figure 75: Workflow Icon Displayed

In the **Workflow** tab, click the workflow you want to use. Work through the defined tasks for the selected workflow.

For more information on these workflows, refer to the *Workflows Configuration Guide*.

Renew Acquisitions and Review e-Product Workflows

The **Renew Acquisitions** workflow is initiated by the **Subscription Renewal** Verde acquisition task (in the KB Tools module). For more information on this task, see **Subscription Renewal** on page **220**.

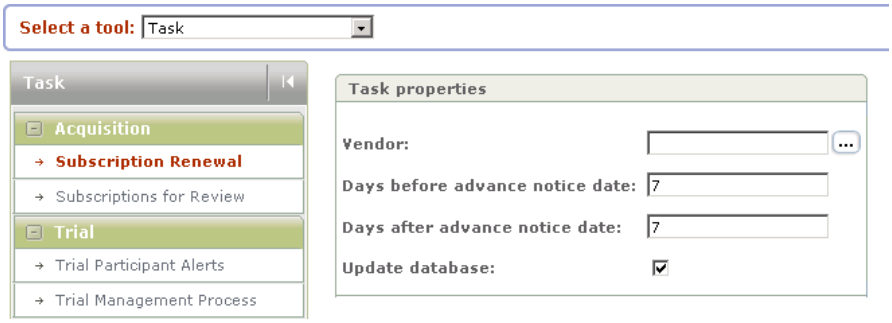

Figure 81. Renew Acquisitions Workflow

When the **Subscriptions for Review** task runs, acquisition records that are not defined as **Automatic Renewal** are assigned a status of **Review**. This initiates the **Review e-Product** workflow. For more information on this task, see **Subscriptions for Review** on page **221**.

17

Organization Management

This section includes:

- **About Organization Management** on page **163**
- **Viewing the Organization List** on page **164**
- **Organization Details** on page **165**

About Organization Management

In addition to e-products, Verde has two other entities: **Organizations** and **Libraries**.

Organization records are created for the various external organizations that the library communicates with in the course of managing electronic resources that vendors and e-interfaces provide. An organization record can be of one of the following types:

- a consortium member
- a consortium
- an interface provider
- a licensing agent
- a licensor
- a vendor

An organization's role determines its relationship with an e-product. For example, the organization type **Interface provider** is generally associated with an e-interface. Each organization can have multiple roles.

Each organization also has several contacts. A contact is a person who has one or more of the following roles:

- Technical support
- Account manager

- Sales representative
- License contact
- Trial contact
- Consortium contact
- Other

Organizations are used in the following Verde areas:

- e-Interfaces, associated with the organization type **Interface provider**.
- Acquisition records, associated with the organization type **Vendor**.
- License records, associated with the organization types **Licensing agent** and **Licensee**.

Note: Organizations existing in one instance cannot be viewed by other instances in the consortium. If member instances in a consortium work with the same list of organizations, it is possible to create one organization input file and load it using the organization loader in each instance. For more information about the organization loader, see **About Organization Input Files** on page **327**.

Viewing the Organization List

From the **Managing** drop-down list, select **Organizations**. A list of organizations is displayed.

The organization list is sorted alphabetically by organization name. An organization has one main name and may have several alternate names. Each version of the name appears in the list. To access a particular organization within a long list of organizations, use the **Jump to** option that appears above the list.

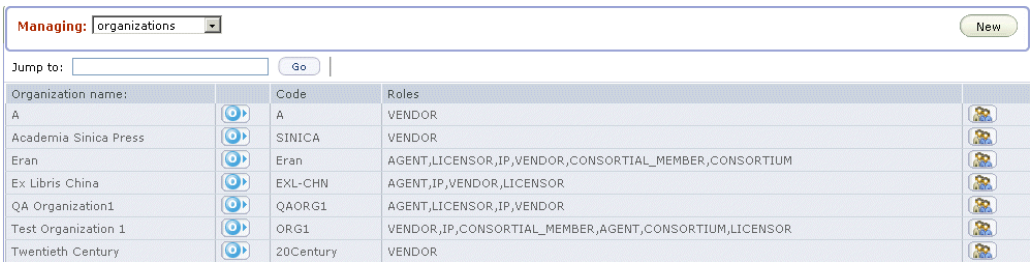

Figure 76: Organization List

The organization list displays the following information:

- the name of the organization
- the **Open Organization** button (enabling you to open the organization record)
- the organization's code
- the organization's role
- the **Contacts** button (opens the organization record's Contacts tab)

To create a new organization, click the **New** button in the top right-hand corner of the screen. To edit the details of an existing organization, click the **Open Organization** button of the record you want to edit. The organization record's Details tab opens.

> **Note:** Organizations cannot be deleted. They can only be marked as inactive. Organizations that are inactive continue to display in the organization list, but do not display in the e-product attribute record organization lists.

Organization Details

The organization details screen consists of two tabs:

- Details
- Contacts

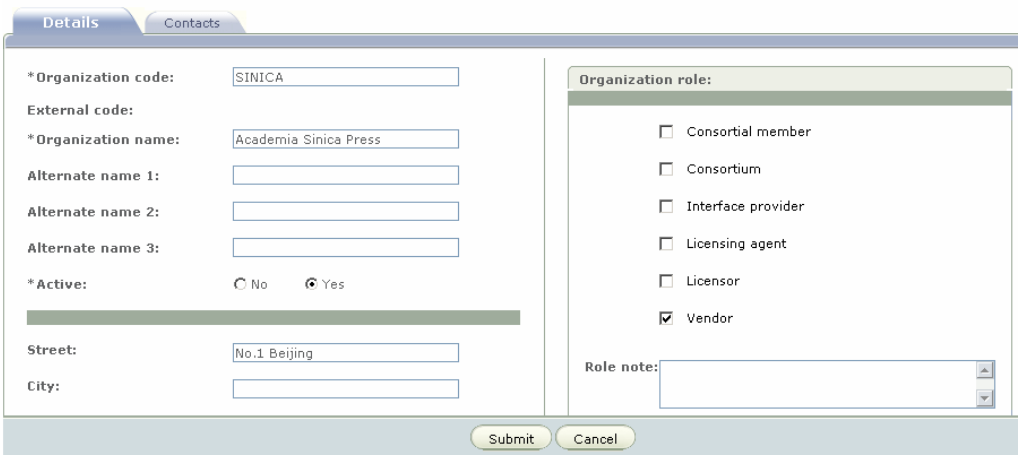

Figure 77: Organization Details

Details Tab

When creating a new organization record, the following fields are mandatory:

- **Organization code** – The following characters can be used for organization code: a-z, A-Z, 1-10, _ (underscore). The organization code is unique across organizations and libraries within an instance. Thus, if organization A with organization code X exists in a certain instance, another organization with organization code X or library with library code X cannot be created in this instance.
- **External code** – This field is displayed as read-only for organizations that are vendors and have a different code in an external system that interacts with Verde. All characters are legal in the external code field.
- **Organization name**
- **Active** (Yes or No)

You may choose whether you want to complete the other fields or leave them blank.

The following organization roles can be defined:

- Consortial member
- Consortium
- Interface provider
- Licensing agent
- Licensor
- Vendor

More than one role can be assigned. If you leave this section blank, the system assigns a default role of **Vendor** to the organization.

Contacts Tab

Any number of contacts can be defined for each organization.

Each contact can have one or more roles. Alternatively, there can be one or more contacts with the same role.

The following organization roles are available:

- Technical support
- Account manager
- Sales representative
- License contact
- Trial contact

- Consortial contact
- Other

To add a new contact, click the **Add Contact** button. The contact name and e-mail address are mandatory fields. Other fields can either be completed or left blank. If no role is selected, the role **Other** is assigned by default.

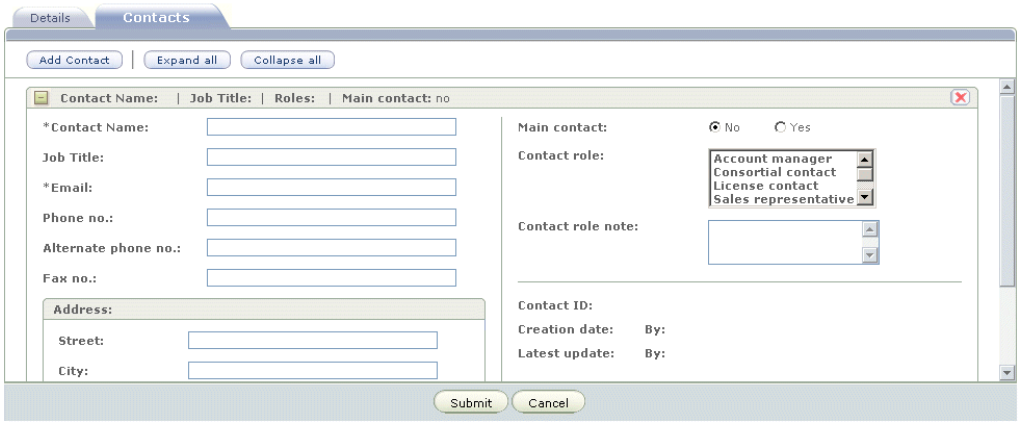

Figure 78: Add Contact

Only one contact can be defined as the main contact. If you try and create more than one record with the **Main contact** field defined as **Yes**, you receive an error message and the second record is not updated. In addition, main contact records cannot be deleted. To delete such records, you must first set the **Main contact** field to **No**.

Note the option to expand or collapse all contact details. If you click **Expand All**, you can edit all of the contact records one after the other. Alternatively, you can click the + (plus) button to the left of a specific record to edit this record only.

Figure 79: Collapsed Contact Records

18

Library Management

This section includes:

- **About Library Management** on page **169**
- **Viewing the Library List** on page **170**
- **Library Details** on page **170**

About Library Management

Verde libraries represent different administrative units within the Verde installation, enabling Verde to support various organizational structures, including a consortium.

In single instances, there are two levels of libraries:

- Instance – The instance is the highest level. Every Verde instance has its own view of the Verde database and is independent in terms of e-product management.
- Institution – A single instance can support one or more institutions. All institutions within one instance share the e-products and key attributes such as acquisition, license, trial, access, and admin records. Local acquisition, cost, and usage records can be created at the institution level. In addition, it is possible to record resource access authorization information at the institution level (that is, whether or not the institution may access specific resources).

Viewing the Library List

From the **Managing** drop-down list, select **Libraries**. A list of libraries is displayed.

The library list is sorted alphabetically by library name. To access a particular library within a long list of organizations, use the **Jump to** option that appears above the list.

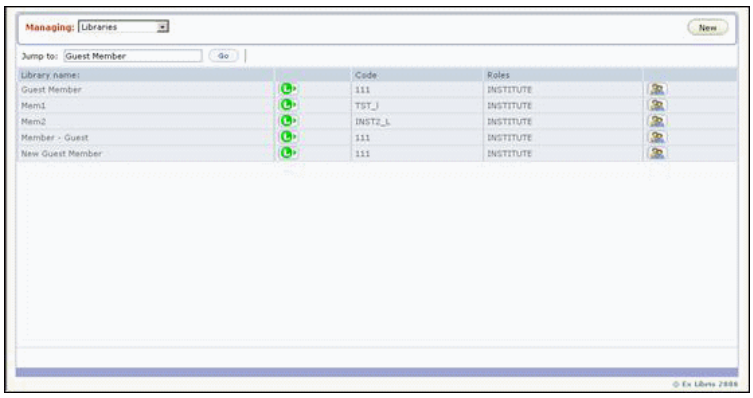

Figure 80: Library List

The library list displays the following information:

- the name of the library
- the **Open Library** button (enabling you to open the library record)
- the library's code
- the library's role – Institute or Instance
- the **Contacts** button (opens the library record's Contacts tab)

To create a new library, click the **New** button in the top right-hand corner of the screen. To edit the details of an existing library, click the **Open Library** button of the record you want to edit. The library record's Details tab opens.

Library Details

The library details screen consists of four tabs:

- Details
- Contacts
- IP Lists
- Proxy Server

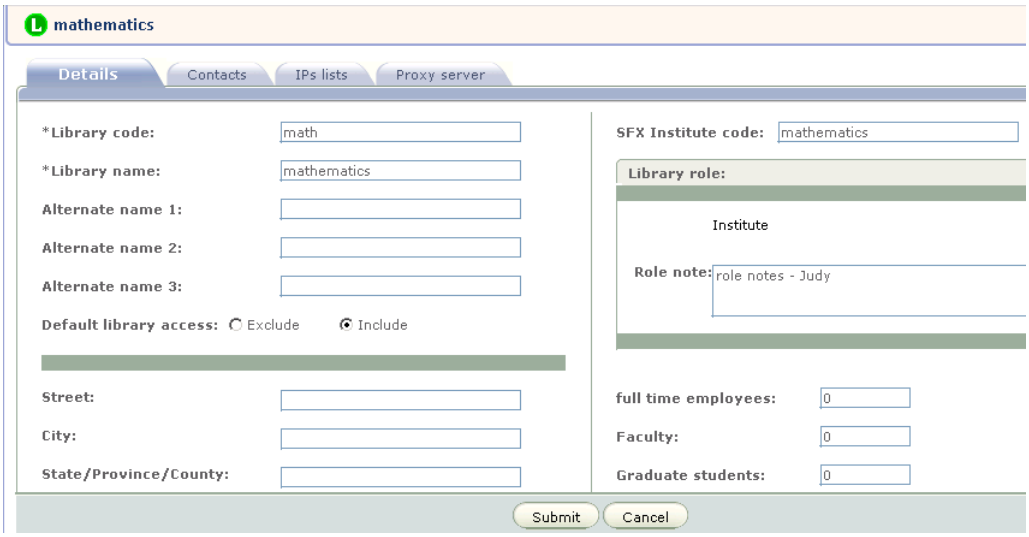

Figure 81: Library List – Details Tab

Details Tab

When creating a new library record the following fields are mandatory:

- **Library code** – The library code must be unique across all library types. An institute and instance, therefore, cannot share the same code. In addition, the library code must be unique within the installation. Thus, if a library exists in one instance, another library with the same library code cannot be created in a different instance. Similarly, Verde does not allow you to create a library whose library code is the same as the organization code of an organization that exists in the same instance. Thus, if an organization with an organization code X exists in an instance, a library with the library code X cannot be created in this instance.
- **Library name**
- **Role**

For sites that want to synchronize Verde and SFX, the following additional fields are mandatory:

- **SFX institute code** – for an institute record
- **SFX instance code** – forn an instance record

Verde instances interact with SFX instances and Verde institutes interact with SFX institutes. Verde does not interact with SFX groups.

When working in a multi-instance shared environment, there are two additional mandatory fields in the central instance:

- **Guest member** – This is a member for which the center manages resources. The guest member does not have Verde instances of its own. The default for

this field is **No**. For more information about guest members, see **Setting Up Guest Profiles** on page **449**.

- **Related instance**

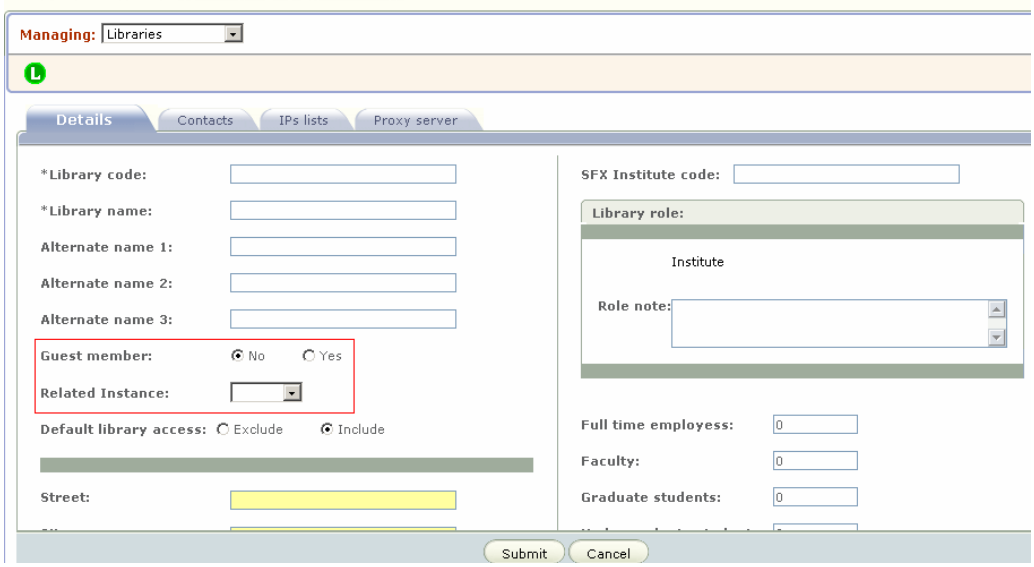

Figure 82: Library List Details – Mandatory Fields

Contacts Tab

Any number of contacts can be defined for each library.

Each contact can have one or more roles. Alternatively, there can be one or more contacts with the same role.

The following library roles are available:

- e-Product sponsor
- Selector
- Donor
- e-Product ACQ contact
- e-Product license contact
- e-Product access contact
- Purchase partner contact
- SFX
- MetaLib
- Other
- ILS Acquisition
- ILS Cataloging

To add a new contact, click the **Add Contact** button. The contact name and e-mail address are mandatory fields. Other fields can either be completed or left blank. If no role is selected, the role **Other** is assigned by default.

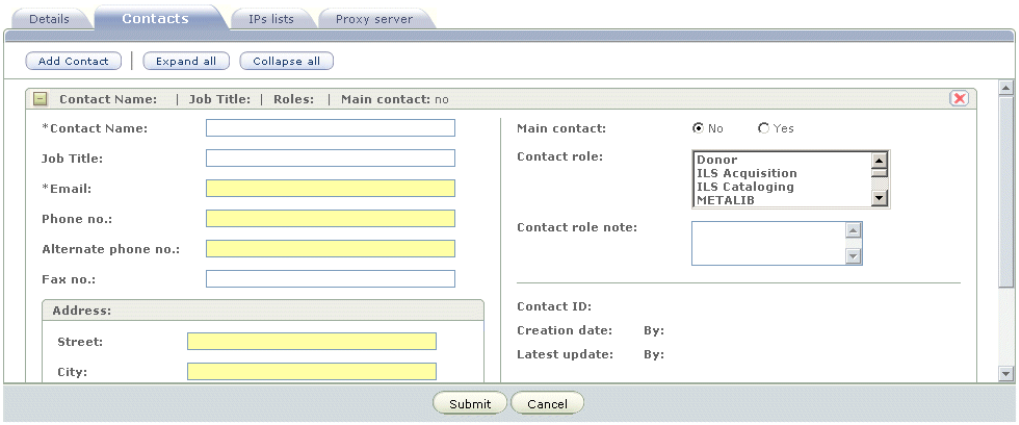

Figure 83: Library Contacts

Only one contact can be defined as the main contact. If you try and create more than one record with the **Main contact** field defined as **Yes**, you receive an error message and the second record is not updated. In addition, main contact records cannot be deleted. To delete such records, you must first set the **Main contact** field to **No**.

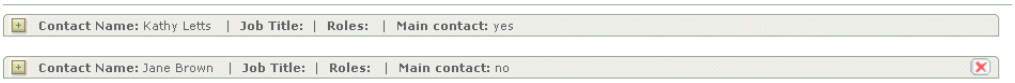

Figure 84: Setting Main Contact Field to No

Note the option to expand or collapse all contact details. If you click **Expand All**, you can edit all of the contact records one after the other. Alternatively, you can click the + (plus) button to the left of a specific record to edit this record only.

IP Lists Tab

The **IP Lists** tab stores IP list ranges for use by access management devices and systems.

Any number of internal ranges and IP ranges can be added for a vendor. These ranges can be edited at any time. Use the **Add Range** button to add new ranges. IP ranges can be entered in a single column using the – and * characters. IP ranges can be included or excluded. By default, they are included.

IP ranges can be added in the following formats:

- a range using the **From** and **To** columns:

```
176.168.1.1   176.168.1.100
```

- a range using the **From** column only:

```
176.168.1.1-76
172.168.1.*
172.168.1-10.*
172.168.*.*
```

IP ranges are sorted in ascending order.

A **Note** field can be added, as in the following example.

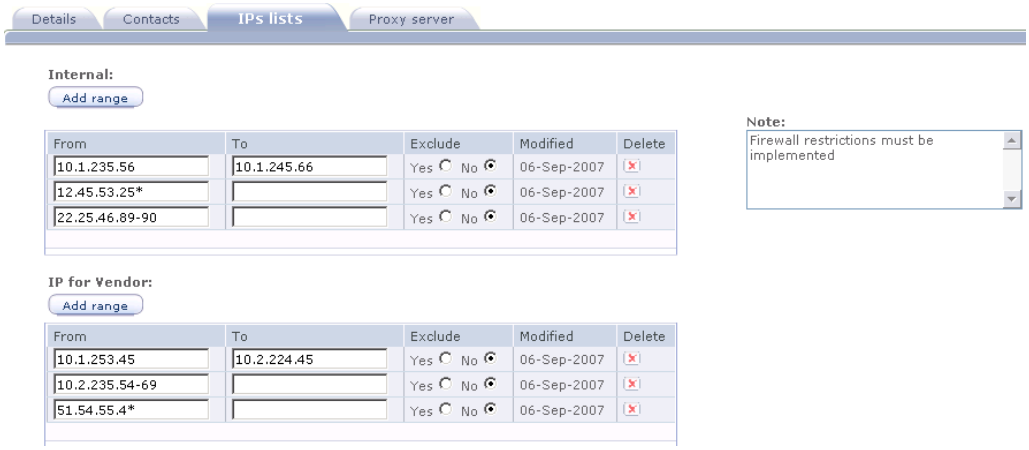

Figure 85: IPs Lists

Proxy Server Tab

The **Proxy Server** tab includes fields related to proxy server definitions.

Part 3

KB Tools Module

Part 3 contains the following:

- Section 19: **Introducing the KB Tools Module** on page 177
- Section 20: **Reports** on page 181
- Section 21: **View Report Output** on page 197
- Section 22: **Tasks** on page 219
- Section 23: **View Task Output** on page 225
- Section 24: **Overview of Loaders** on page 231
- Section 25: **e-Constituent Input Files** on page 243
- Section 26: **e-Standalone Input Files** on page 257
- Section 27: **Acquisition Input Files** on page 275
- Section 28: **License Input Files** on page 281
- Section 29: **Library, Library Contact, and Library IP Input Files** on page 315
- Section 30: **Organization and Organization Contact Input Files** on page 327
- Section 31: **Admin and Local Admin Input Files** on page 337
- Section 32: **Access and Access Authorization Input Files** on page 349
- Section 33: **View Loader Output** on page 363
- Section 34: **View KB Reports and View Scheduled Tasks** on page 369
- Section 35: **Customized Report Outputs** on page 371

19

Introducing the KB Tools Module

The KB Tools module contains tools for running reports, performing tasks, and loading data. All the KB tools are run in offline mode.

You can run reports or tasks once, as a single instance, or you can use the scheduler to define a recurrence pattern and range in order to run reports and tasks at a later time.

To access KB Tools, in the top toolbar, click **KB Tools**.

Figure 86: KB Tools

The KB Tools module includes the following tools:

- Report – enables you to submit a report
- Task – enables you to submit a task
- Loader – enables you to submit a loader
- View Loader Output – enables you to view the output of a specific loader
- View Report Output – enables you to view a specific report
- View Task Output – enables you to view the output of a specific task
- View KB Reports – enables you to view all KB reports
- View Scheduled Tasks – enables you to view all the scheduled tasks

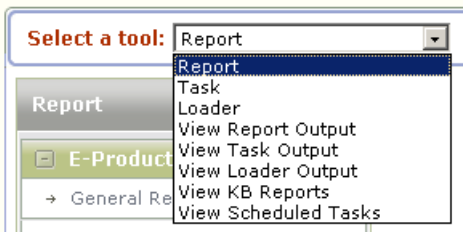

Figure 87: Select a KB Tool

All the KB Tools module menus can be collapsed or expanded by clicking the plus (+) or minus (-) signs next to the relevant header. The menus are expanded by default.

Figure 88: Expanded and Collapsed KB Tools Menu

Delivery and Scheduling Properties

The following table describes the available KB tool delivery output options:

Table 16. Delivery Output Properties

Property	Description/Explanation
File format	The following options are available: ■ CSV ■ PRN ■ XML
E-mail	The output can be sent by e-mail as well. To define multiple recipients, use semicolons between e-mail addresses.
Locally defined output	You can select a customized format. Note that the default is **Verde format**.
Report name	The name of the report. Note that this field is not mandatory.

Reports and tasks can be scheduled. The following scheduling options are available:

- Start time (hh:mm)
- Recurrence pattern (daily, weekly, or monthly, with the additional option of defining whether tasks/reports should be run over weekends)
- Range of recurrence (the start and end dates of recurring runs—for example, if you want to run a task/report daily for the next two weeks)

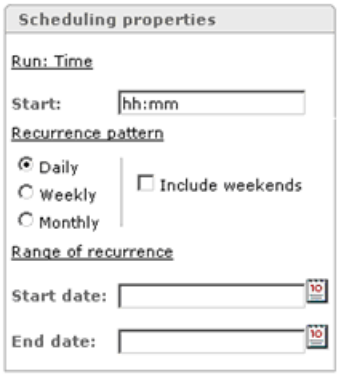

Figure 89: Scheduling Properties

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Reports

This section includes:

- **General Report of e-Products** on page **181**
- **Report e-Products by Selection Status** on page **190**
- **Report on e-Packages with Acquisitions** on page **191**
- **Report on Locally Created e-Products** on page **192**
- **Report on e-Product with Usage Statistics** on page **193**
- **Report of Active e-Products without Licenses** on page **194**
- **Report of IP Ranges by Licensor** on page **195**

General Report of e-Products

This is a generic report that includes most of the fields related to e-products.

The first part of this report offers the option of filtering the output by:

- **Instances** (available in consortium environments only) – Note that only the instances in which the user was granted permission to run the report are displayed in the report form.
- **View Full Package Content** – If the user selects this option, the output file includes packages that match the retrieval parameters and all the e-constituents that belong to the package, even if the e-constituents do not match the retrieval parameters. If **View Full Package Content** is not selected, the output file includes packages that match the retrieval parameters, but only the e-constituents that match the retrieval parameters are included in the output.

- **Sort by**

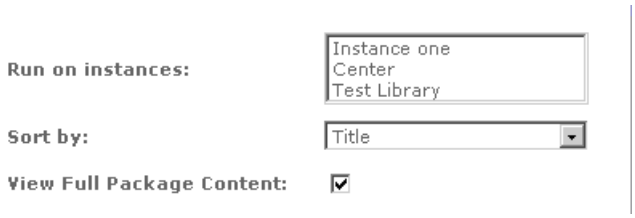


Figure 90: Reports – Filtering the Output

The second part allows for defining parameters related to the e-product.

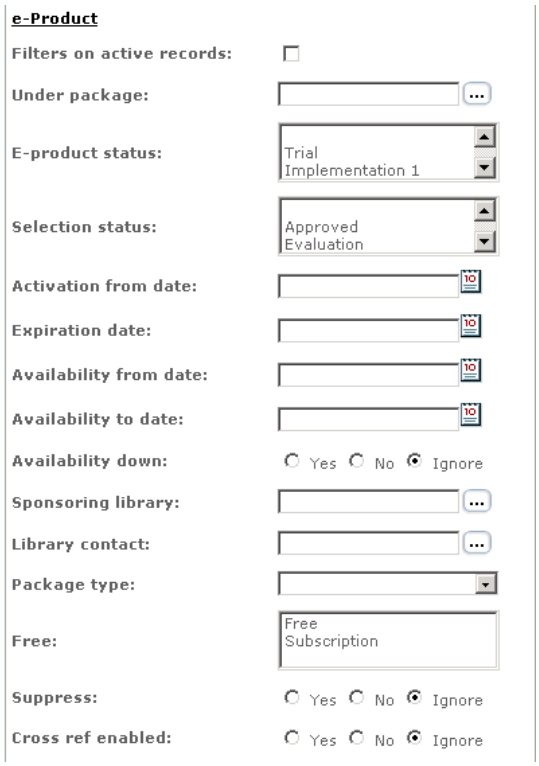


Figure 91: Reports – Defining e-Product Parameters

The available fields are:

- **Filters on active records –** An e-product is considered active if it has an e-product status that is not **Withdrawn**, and if the current date is greater than the active from date and smaller than the expiration date.
- **Under package –** You can limit your report to set of e-constituents that are related to one specific package. Clicking the ellipsis on the right side of the

field activates a pop-up window displaying a list of all Verde e-packages. Select the required e-package from the list.

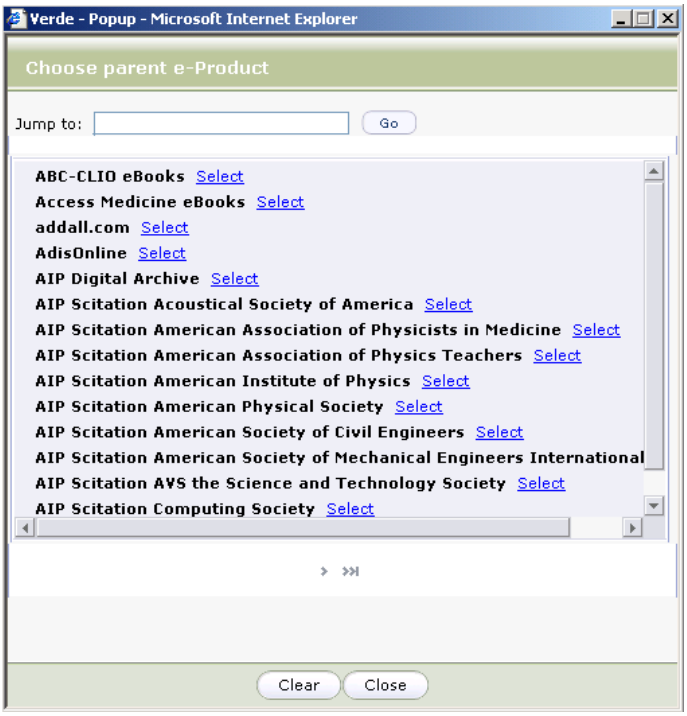

Verde - Popup - Microsoft Internet Explorer
Choose parent e-Product
Jump to:
Go
ABC-CLIO eBooks Select
Access Medicine eBooks Select
addall.com Select
AdisOnline Select
AIP Digital Archive Select
AIP Scitation Acoustical Society of America Select
AIP Scitation American Association of Physicists in Medicine Select
AIP Scitation American Association of Physics Teachers Select
AIP Scitation American Institute of Physics Select
AIP Scitation American Physical Society Select
AIP Scitation American Society of Civil Engineers Select
AIP Scitation American Society of Mechanical Engineers International
AIP Scitation AVS the Science and Technology Society Select
AIP Scitation Computing Society Select
Clear
Close

Figure 92: Reports – Under Package Parameter

- **e-product status** – Possible values are:
  - Trial
  - Implementation 1
  - Implementation 2
  - Implementation 3
  - Production
  - Withdrawn
- **Selection status**. Values are:
  - Evaluation
  - Review
  - Approved
  - Final approved
  - Rejected
  - Withdrawn by publisher
- **Activation from date** – Date from which the e-product is active.

- **Expiration date** - Date until which the e-product are active.
- **Availability down** – yes/no/ignore. This relates to the flag that signifies if the e-product is available or not. You can choose to retrieve by, or ignore this flag.
- **Availability from date** – Date from which the e-product is available.
- **Availability to date** – Date until which the e-product are available.
- **Sponsoring library** – The library that sponsored the e-product. Note that clicking the ellipsis on the right side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.

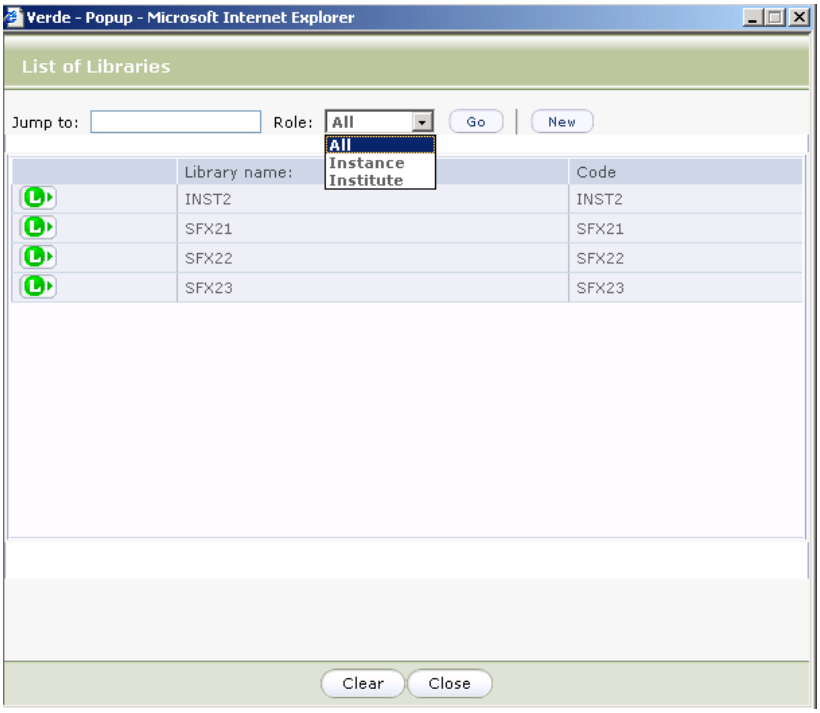


Figure 93: Reports – Sponsoring Libraries

- **Library contact**. Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Package type** - aggregator or selective.
- **Free** - is the resource available free of charge or is it a paid subscription.
- **Suppress yes/no/ignore**. Flag that indicates if the e-product is hidden from Public View.
- **Cross ref enabled yes/no/ignore**

The next part of the report input deals with parameters related to acquisitions:

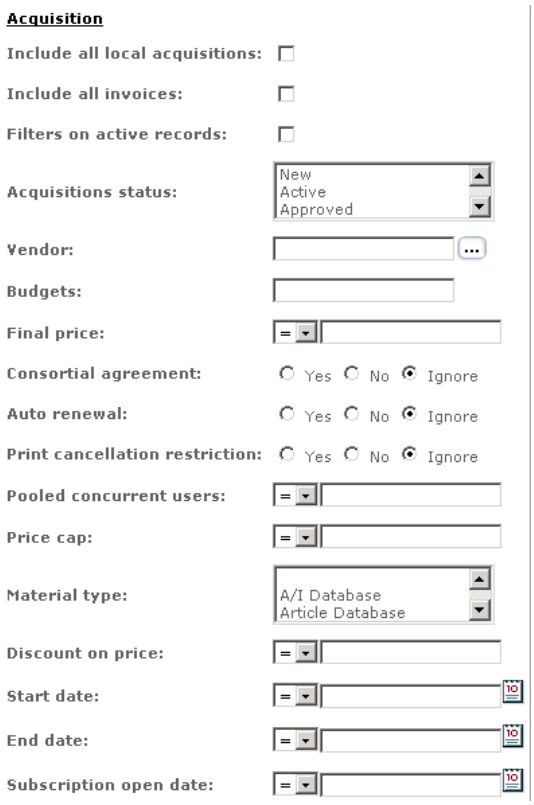


Figure 94: Reports – Defining Acquisition Parameters

The available fields are:

- **Include all local acquisitions**
- **Include all invoices**
- **Filters on active records –** An acquisition record is active if it has a status that is **Active** or **Renewed** and if the current date falls between the start and end dates**.**
- **Acquisitions status**. Possible (default values) are:
  - New
  - In Process 1
  - In Process 2
  - In Process 3
  - Approved
  - Denied
  - Sent for Additional Processing
  - On Hold

- Active
- Renewed
- Cancelled

- **Vendor** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Final price** – final price of the subscription. This can be defined as:
  - = equal to
  - > less than
  - < more than
- **Consortial agreement**: yes/no/ignore – If the acquisition record is consortial.
- **Auto renewal**: yes/no/ignore – The flag that controls renewal.
- **Print cancellation restriction**: yes/no/ignore – Contractual restrictions on canceling subscriptions for print versions of journals contained in the package.
- **Pooled concurrent users** – Can be defined as equal to, less than, or more than. This defines the number of concurrent users being purchased. It may be spread across one or more e-products.
- **Price cap**: equal to, less than or more than. This is the amount by which the price can rise.
- **Material type**
- **Discount on price** – Can be defined as equal to, less than, or more than. It is the percentage discount negotiated with the vendor.
- **Start and end dates –** The start and end dates of the annual subscription. Can be defined as equal to, less than, or more than.
- **Subscription open date -** Can be defined as equal to, less than, or more than.

The next part of the report input deals with parameters related to local acquisitions:

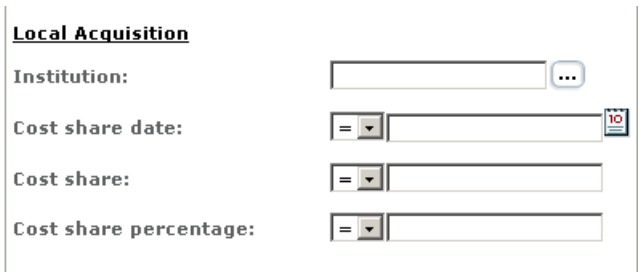


Figure 95: Reports – Defining Local Acquisition Parameters

The available fields are:

- **Institution** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of libraries with filter option by role.
- **Cost share date** – Can be defined as equal to, less than, or more than.
- **Cost share** – The amount that the institution is paying for the e-product.
- **Cost share percentage** – The percentage amount that the institution is paying for the e-product.

The following part of the report input deals with parameters related to invoices:

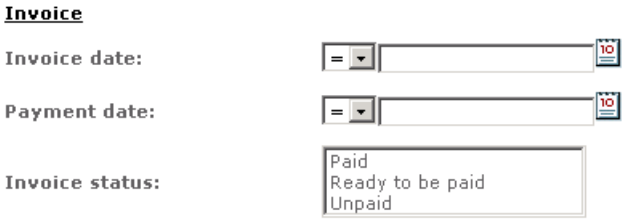


Figure 180. Reports – Defining Invoice Parameters

The available fields are:

- **Invoice date** – Can be defined as equal to, less than, or more than.
- **Payment date** – Can be defined as equal to, less than, or more than.
- **Invoice status** – Possible values are:
  - Paid
  - Ready to be paid
  - Unpaid

The last part of the report input deals with parameters related to the license:

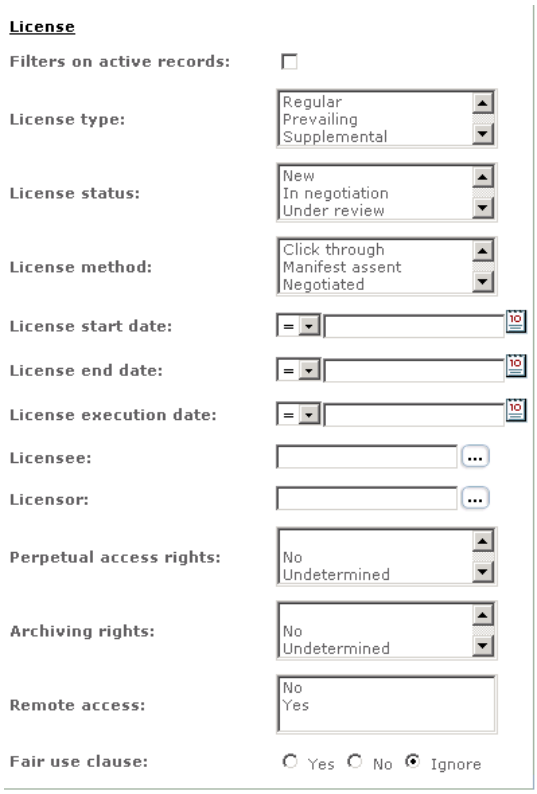


Figure 96: Reports – Defining License Parameters

The available fields are:

- **Filters on active records –** if the box is selected, only licenses that have the status **Approved** will be retrieved.
- **License type**. Possible values are:
  - Regular
  - Trial
  - Supplemental
  - Prevailing
- **License status**. Values are:
  - New
  - In negotiation
  - Under review
  - Under local review
  - Pending local response
  - Pending licensor response

- Awaiting vendor generic license
- Redacted version created
- Electronic version created
- Awaiting local signature
- Final legal version received
- Approved
- Pending final local signature
- Retired
- Pending final signature by licensor
- Approved locally
- Rejected

- **License method**. Values are:
  - Negotiated
  - Click through
  - Online
  - Manifest Assent
  - Shrinkwrap
- **License start and end dates** - Can be defined as equal to, less than or more than. These are the dates on which the license becomes active or expires.
- **License execution date** – Can be defined as equal to, less than or more than. Date on which the license was executed.
- **Licensee** – Clicking the ellipsis on the right side of the field activates a pop-up window of libraries (licensees) with filter option by role.
- **Licensor** – Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors) with filter option by role.
- **Perpetual access rights**. Options are:
  - Yes
  - No
  - Undetermined
- **Archiving rights**. Options are:
  - Yes
  - No
  - Undetermined

- **Remote access**. Options are:
  - Yes
  - No
- **Fair use clause** – yes/no/ignore.

After filling in the relevant parameters, choose the delivery and scheduling options as described in **Delivery and Scheduling Properties** on page **178**.

Report e-Products by Selection Status

This report retrieves e-products by selection status.

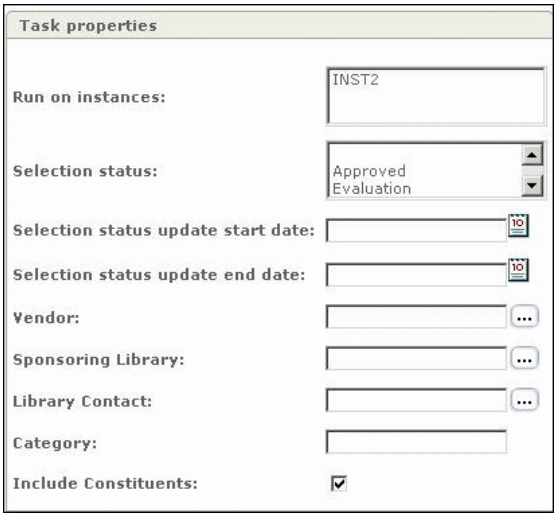


Figure 97: Report e-Product by Selection Status

Retrieval is based on the following parameters:

- **Instances** (available in consortium environment only) – Only instances in which the user was granted permission to run the report are displayed in the report form.
- **Selection status –** Values are:
  - Approved
  - Evaluation
  - Final Approval
  - Rejected
  - Review
  - Withdrawn by publisher

- **Selection status update start date** – The system retrieves e-products whose selection status was updated starting from this date.
- **Selection status update end date** – The system retrieves e-products whose selection status was updated ending with this date.
- **Vendor** – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Sponsoring library** – The library that sponsored the e-product. Clicking the ellipsis on the right side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Library contact.** Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Category**
- **Include constituents**

Report on e-Packages with Acquisitions

This report retrieves e-packages that have acquisition information.

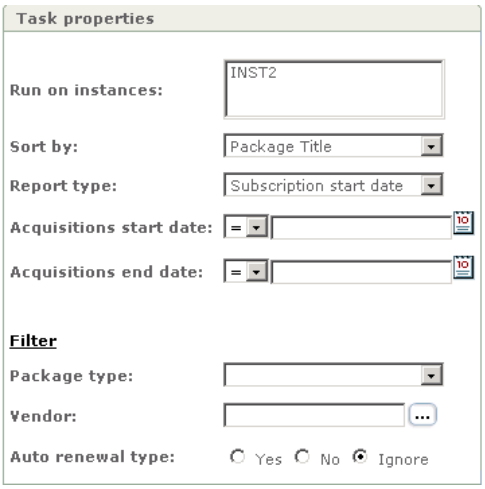


Figure 98: Report on e-Packages with Acquisitions

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.

- **Sort by**. Options are:
  - Package title
  - Date
- **Report type**:
  - Subscription start date
  - Subscription end date
  - Renewal date
- **Acquisitions start and end dates** – Can be defined as equal to, less than, or more than. If user leaves the start date blank, the "start date" input parameter is automatically filled in with today's date minus 30 days. Filter options are:
- **Package type**:
  - Aggregator
  - Selective
- **Vendor**. Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors) with filter option by role.
- **Auto renewal type** – Yes/No/Ignore.

Report on Locally Created e-Products

This report retrieves e-products that have been created locally.

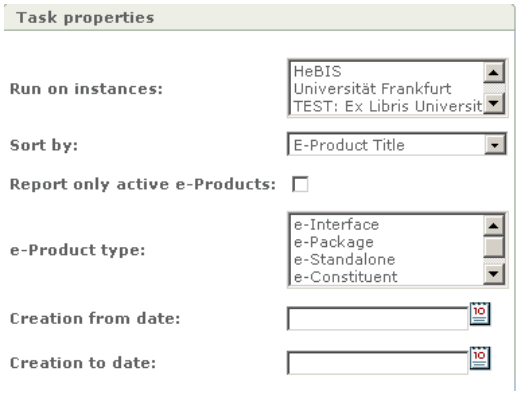


Figure 99: Report on Locally Created e-Products

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.

- **Sort by**. Options are:
  - e-Product title
  - Creation date
- **Report only active e-products –** An e-product is active if it has an e-product status that is not **Withdrawn** and if the current date is greater than the activation from date and smaller than the expiration date.
- **e-Product type**:
  - e-Interface
  - e-Package
  - e-Standalone
  - e-Constituent
  - e-Print
- **Creation to and from dates**

Report on e-Product with Usage Statistics

This report provides information on e-products that contain usage statistics.

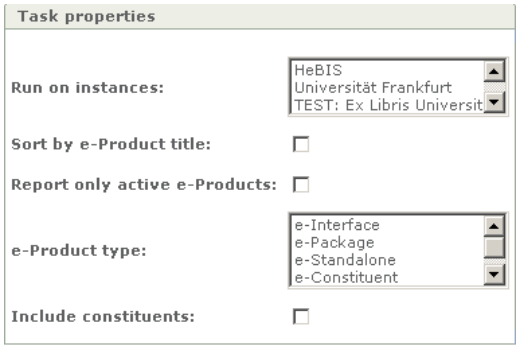


Figure 100: Report on e-Product with Usage Statistics

These are e-products in which **Yes** is selected in the admin record's **Usage statistics available** field.

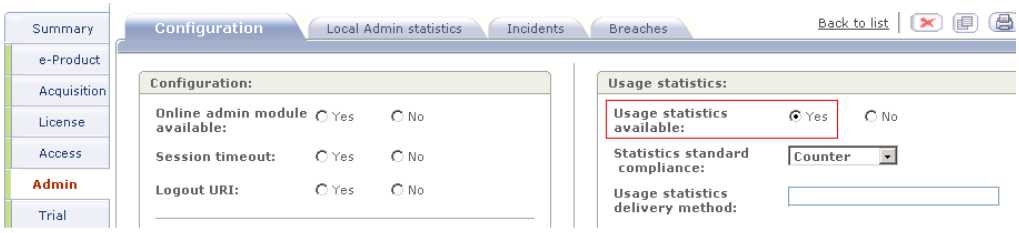


Figure 101: Usage Statistics Available

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by e-product title**
- **Report only active e-products** –An e-product is active if it has an e-product status other than Withdrawn and when the current date is greater than the activation from date and less than the expiration date.
- **e-product type**
- **Include constituents**

Report of Active e-Products without Licenses

This report retrieves active e-products without licenses. An e-product is active if it has an e-product status other than **Withdrawn** and when the current date is greater than the activation from date and less than the expiration date.

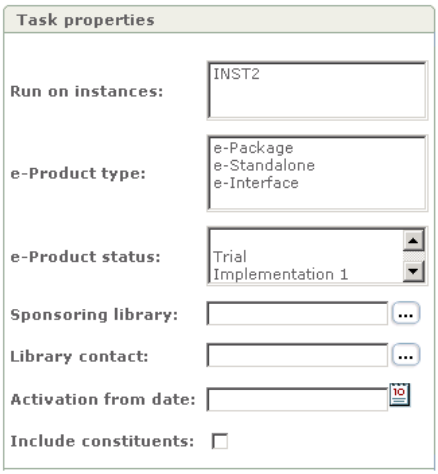


Figure 102: Report of Active e-Products Without Licenses

You can define the following parameters for this report:

- **Instances** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **e-Product type:**
  - e-Package
  - e-Standalone
  - e-Interface

- **e-Product status**. Possible values are:
  - Trial
  - Implementation 1
  - Implementation 2
  - Implementation 3
  - Production
  - Withdrawn
- **Sponsoring library**. The library that sponsored the e-product. Note that clicking on the ellipsis on the right hand side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Library contact.** Note that clicking the ellipsis on the right side of the field activates a pop-up window, which displays a list of defined contacts with filter option by role.
- **Activation from date**. Date from which the e-product is active.
- **Include constituents**. If the user selects this option, the output file includes packages that match the selected filters and all the constituents that belong to this package even if the constituents do not match the filters and other conditions. If the **Include Constituents** check box is not selected, only the constituents that match filters are included in the output together with their parent package.

Report of IP Ranges by Licensor

This is a report of IPs that are valid per active license. A license is active if it has the status **Approved** and if the current date is between or equal to the license start and end dates. IP ranges are defined per library or per license. Licensed libraries are listed in the **Allowed Location** tab of the license.

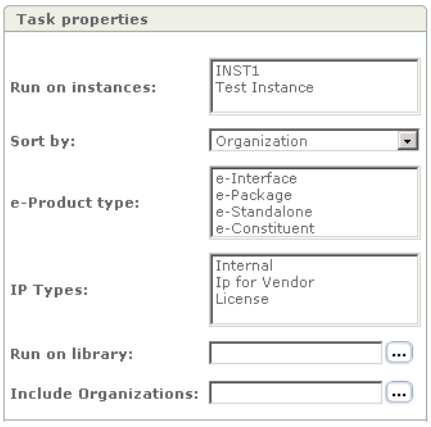


Figure 103: Report of IP Ranges by Licensor

You can define the following parameters for this report:

- **Instance** (available in consortium environment only). Note that only instances in which the user was granted permission to run the report are displayed in the report form.
- **Sort by**. Options are:
  - Organization
  - Library
  - e-Product title
- **e-Product type:**
  - e-Interface
  - e-Package
  - e-Standalone
  - e-Constituent
- **IP types:**
  - Internal – taken from the Library record
  - IP for Vendor – taken from the Library record
  - License – IP range entered directly on the license allowed location tab.
- **Run on libraries** - **C**licking on the ellipsis on the right hand side of the field activates a pop-up window displaying a list of defined libraries with filter option by role.
- **Include Organizations** - Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors) with filter option by role.

21

View Report Output

This section includes:

- **About Viewing Report Output** on page **198**
- **General Report of e-Products** on page **200**
- **Report e-Products by Selection Status** on page **208**
- **Report on e-Packages with Acquisitions** on page **209**
- **Report on Locally Created e-Products** on page **210**
- **Report on e-Products with Usage Statistics** on page **211**
- **Report of Active e-Products Without Licenses** on page **211**
- **Report of IP Ranges by Licensor** on page **217**

About Viewing Report Output

View Report Output shows all the occurrences of each report. These can be reports run in the past or reports currently running. The list of report outputs is identical to the list of reports defined in **Reports** on page **181**.

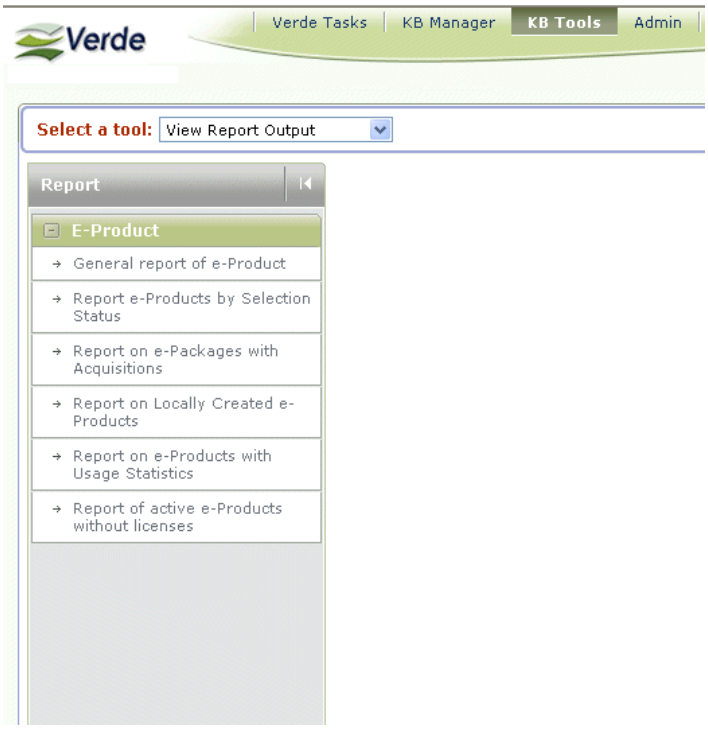


Figure 104: Select a Tool – View Report Output

Clicking any of the reports opens a screen displaying the following columns of information:

- **Report date**
- **Report name**
- **Report summary**
- **Report file**

- **Report status**

Figure 105: Report Output

- **Report date** – The date and time that the report was run.
- **Report name** – The report name that can be defined in the Delivery Properties window.
- **Report summary –** A log is created for all reports that have either run successfully, or have failed completion. Clicking the summary hyperlink activates a dialog for opening or saving the status report.

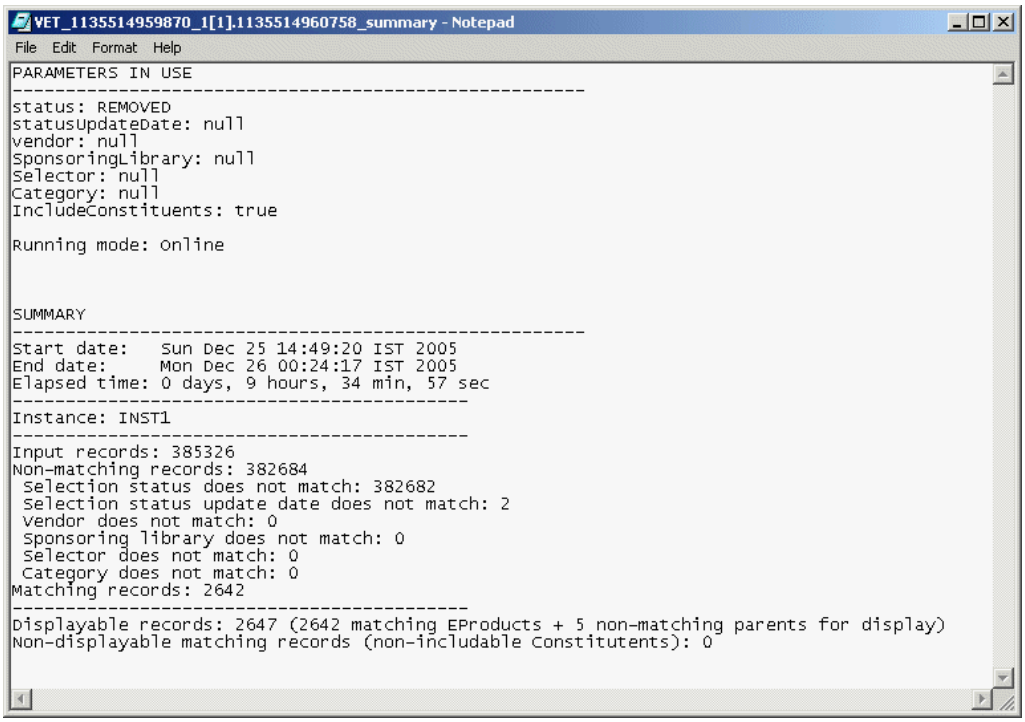
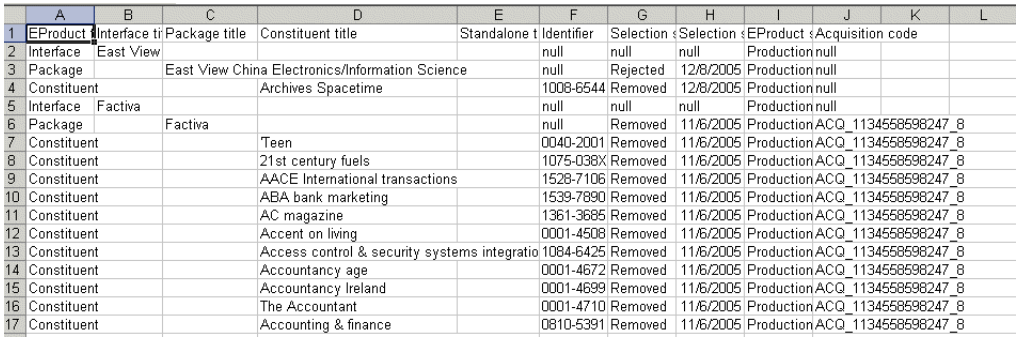

VET_1135514959870_1[1].1135514960758_summary - Notepad
File Edit Format Help
PARAMETERS IN USE
status: REMOVED
statusUpdateDate: null
vendor: null
SponsoringLibrary: null
Selector: null
Category: null
IncludeConstituents: true
Running mode: Online
SUMMARY
Start date: Sun Dec 25 14:49:20 IST 2005
End date: Mon Dec 26 00:24:17 IST 2005
Elapsed time: 0 days, 9 hours, 34 min, 57 sec
Instance: INST1
Input records: 385326
Non-matching records: 382684
Selection status does not match: 382682
Selection status update date does not match: 2
Vendor does not match: 0
Sponsoring library does not match: 0
Selector does not match: 0
Category does not match: 0
Matching records: 2642
Displayable records: 2647 (2642 matching EProducts + 5 non-matching parents for display)
Non-displayable matching records (non-includable Constitutents): 0

Figure 106: Report Summary

- **Report file** – When the report has run successfully, the output can be viewed by clicking the output hyperlink. This activates a dialog box for

opening or saving the output. The output is in the format chosen when running the report—for example, CSV, or XML.



	A	B	C	D	E	F	G	H	I	J	K	L
1	EProduct t	Interface ti	Package title	Constituent title	Standalone t	Identifier	Selection s	Selection s	EProduct s	Acquisition code		
2	Interface	East View				null	null	null	Production	null		
3	Package		East View China Electronics/Information Science			null	Rejected	12/8/2005	Production	null		
4	Constituent			Archives Spacetime		1008-6544	Removed	12/8/2005	Production	null		
5	Interface	Factiva				null	null	null	Production	null		
6	Package		Factiva			null	Removed	11/6/2005	Production	ACQ_1134558598247_8		
7	Constituent			'Teen		0040-2001	Removed	11/6/2005	Production	ACQ_1134558598247_8		
8	Constituent			21st century fuels		1075-038X	Removed	11/6/2005	Production	ACQ_1134558598247_8		
9	Constituent			AACE International transactions		1528-7106	Removed	11/6/2005	Production	ACQ_1134558598247_8		
10	Constituent			ABA bank marketing		1539-7890	Removed	11/6/2005	Production	ACQ_1134558598247_8		
11	Constituent			AC magazine		1361-3685	Removed	11/6/2005	Production	ACQ_1134558598247_8		
12	Constituent			Accent on living		0001-4508	Removed	11/6/2005	Production	ACQ_1134558598247_8		
13	Constituent			Access control & security systems integratio		1084-6425	Removed	11/6/2005	Production	ACQ_1134558598247_8		
14	Constituent			Accountancy age		0001-4672	Removed	11/6/2005	Production	ACQ_1134558598247_8		
15	Constituent			Accountancy Ireland		0001-4699	Removed	11/6/2005	Production	ACQ_1134558598247_8		
16	Constituent			The Accountant		0001-4710	Removed	11/6/2005	Production	ACQ_1134558598247_8		
17	Constituent			Accounting & finance		0810-5391	Removed	11/6/2005	Production	ACQ_1134558598247_8		

Figure 107: Report File

- **Report Status** – The last column describes the report run status. Possible options are:
  - In progress
  - Completed
  - Failed

General Report of e-Products

The default output parameters of the **General Report of e-Products** are listed in the tables below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 17. e-Product Fields

	Internal Name	Display Name
1	eproductType	e-Product type
2	eproductTitle	e-Product title
3	eproductIdentifier	e-Product identifier
4	eproductCode	e-Product code
5	workExpressionCode	Work expression code
6	(eproduct)instanceCode	Instance code
7	sourceInstanceCode	Source instance code

Table 17. e-Product Fields

	Internal Name	Display Name
8	SFXID	SFX id
9	metaLibID	MetaLib id
10	otherID	Other id
11	otherSource	Other source
12	updateTarget	Update target
13	procurementStatus	Selection status
14	procurementStatusUpdateDate	Selection status update date
15	eproductStatus	e-Product status
16	eproductStatusUpdateDate	e-Product status update date
17	activityStatusDateFrom	Availability from
18	activityStatusDateTo	Availability to
19	privateNote	Private note
20	(eproduct)createdBy	Created by
21	(eproduct)creationDate	Creation date
22	(eproduct)updatedBy	Update by
23	updateDateCenter	Update center
24	updateDateLocal	Update local
25	activationFromDate	Activation from
26	activationToDate	Activation to
27	concurrentNumberOfUsers	Concurrent number of users
28	mainContact	Selector
29	sponseringLibrary	Sponsoring library
30	automaticUpdate	Automatic update
31	activityStatus	Availability
32	activityStatusDateNote	Activity status date note
33	publicNote	Public note
34	Suppress	Suppress
35	upCode	Up code
36	freeOrSubscription	Free or subscription

Table 17. e-Product Fields

	Internal Name	Display Name
37	crossRefEnabled	Cross ref enabled
38	organizationCode	Organization code
39	Free	Free
40	localCoverage	Local coverage
41	coverageText	Coverage text
42	holdingsInILS	Holdings in ILS
43	holdingsNote	Holdings note
44	packageType	Package type
45	selectiveModeCode	Selective mode code
46	SFXID2	SFX id 2
47	JKEY	JKEY
48	titleKey	Title key
49	globalEmbargoNumberOfMonths	Global embargo number of months
50	globalEmbargoOperator	Global embargo operator
51	addedToPackage	Added to package
52	removedFromPackage	Removed from package

Table 18. Acqusition Fields

	Internal Name	Display Name
70	acquisitionCode	Acquisition code
71	acquisitionNumber	Acquisition number
72	subscriptionPeriodCode	Subscription period code
73	vendorCode	Vendor
74	vendorSubscriptionCode	Vendor subscription code
75	purchaseOrderNo	Purchase order no.
76	ILSSubscriptionNo	ILS subscription no.
77	acquisitionStatus	Acquisition status
78	acquisitionStatusDate	Acquisition status date

Table 18. Acqusition Fields

	Internal Name	Display Name
79	orderDate	Order date
80	subscriptionType	Subscription type
81	subscriptionTypeNote	Subscription type note
82	printPurchaseOrderNo	Print purchase order no.
83	numberOfCopies	Number of copies
84	orderSendMethod	Order send method
85	orderForm	Order form
86	noteForILS	Note for ILS
87	noteForVendor	Note for vendor
88	advanceNoticeDate	Advance notice date
89	renewCancDate	Renew cancellation date
90	renewCancDescisionNote	Renew cancellation decision note
91	renewCancNoteILS	Renew cancellation note ILS
92	renewCancNoteVendor	Renew cancellation note vendor
93	printCancelRestriction	Print cancellation restriction
94	printCancelNote	Print cancel note
95	acquisitionMethod	Acquisition method
96	materialType	Material type
97	Price	Price
98	discountOnPrice	Discount on price
99	pricingModel	Pricing Model
100	pricingCap	Price cap
101	priceCapFrom	Price Cap From
102	priceCapTo	Price Cap To
103	consortialAgreement	Consortial agreement
104	pooledConcurrentUsers	Pooled concurrent users
105	autoRenewal	Auto renewal
106	subscriptionNotification	Subscription notification
107	vendorAdvancedNotice	Vendor advanced notice

Table 18. Acqusition Fields

	Internal Name	Display Name
108	noticePeriodCode	Notice period code
109	instituteCode	Institute Code
110	campusCode	Campus Code
111	concurrentUsersNote	Concurrent Users Note
112	(acquisition)budgets	Budget
113	(acquisition)createdBy	Created By
114	(acquisition)updatedBy	Updated By
115	(acquisition)creationDate	Creation Date
116	(acquisition)updateDate	Update Date
117	subscriptionStartDate	Subscription p. start date
118	subscriptionEndDate	Subscription p. end date

Table 19. License Fields

	Internal Name	Display Name
120	licenseCode	License code
121	licenseName	License name
122	typeCode	License type
123	methodCode	License method
124	(license)startDate	License start date
125	(license)endDate	License end date
126	executionDate	License execution date
127	licenseDuration	License duration
128	(license)statusCode	License status
129	statusNote	License status note
130	licensor	Licensor
131	originalLicensor	Original licensor
132	Licensee	Licensee
133	licensingAgent	Licensing agent

Table 19. License Fields

	Internal Name	Display Name
134	localLicenseNegotiator	Local license negotiator
135	deliveryRequirements	Delivery requirements
136	licenseURI	License URI
137	licenseURIType	License URI type
138	physicalLocation	Physical location
139	fileLocation	File location
140	vendorAdvancedNotice	Vendor advanced notice
141	vendorAdvancedNoticeVal	Vendor advanced notice value
142	noticePeriodCode	Notice period code
143	licensingNote	Licensing note
144	publicNote	Public note
145	replacedBy	Replaced by
146	Replaces	Replaces
147	linkedLicenseNote	Linked license note
148	renewCancMNote	Renew cancellation method Note
149	renewalDate	Renewal date
150	(license)createdBy	Created by
151	(license)updatedBy	Updated by
152	(license)createdDate	Created date
153	(license)updateDate	Update date
154	generalTermsNote	General terms note
155	userRestrictionsNote	User restrictions note
156	useRestrictionsNote	Use restrictions note
157	authorizesUserDef	Authorizes user definition
158	localSuthorizesUserDef	Local authorizes user definition
159	fairUseClauseCode	Fair use clause
160	allRightsReservedCode	All rights reserved code
161	dbProtectionOverrideCode	DB protection override code
162	citationRequirementDetails	Citation requirement details

Table 19. License Fields

	Internal Name	Display Name
163	digitalCopyCode	Digital copy code
164	digitalCopyTermNote	Digital copy term note
165	printCopy	Print copy
166	printCopyTermNote	Print copy term note
167	scholarySharing	Scholarly sharing
168	scholarySharingNote	Scholarly sharing note
169	distanceEducation	Distance education or fax code
170	distanceEducationTermNote	Distance education term note
171	intrLibPrintOrFaxCode	Intr lib print
172	intrLibSecureTransCode	Intr lib secure trans code
173	intrLibElectronicCode	Intr lib electronic code
174	intrLibKeepingRequiredCode	Intr lib keeping required code
175	intrLibTermNote	Intr lib term note
176	courseReservePrintCode	Course reserve print code
177	courseReserveElcORCashCode	Course reserve Electronic or cash code
178	courseReserveTermNote	Course reserve term note
179	electronicLinkCode	Electronic link code
180	electronicLinkTermNote	Electronic link term note
181	coursePackPrintCode	Course pack print code
182	coursePackElectronicCode	Course pack electronic code
183	coursePackTermNote	Course pack term note
184	remoteAccessCode	Remote access code
185	workinTermUseNote	Work in term use note
186	localUsePermission	Local use permission
187	perpetualAccessRights	Perpetual Access rights
188	perpetualAccessFrom	Perpetual access from
189	perpetualAccessTo	Perpetual access to
190	perpetualHoldingsNote	Perpetual holdings note

Table 19. License Fields

	Internal Name	Display Name
191	archivingRightsCode	Archiving rights code
192	archivingFormatCode	Archiving format code
193	archivingNote	Archiving note
194	accessabilityCompliance	Accessibility compliance
195	completenessOfContentCode	Completeness of content Code
196	concurrencyWithPrintCode	Concurrency with print code
197	intellectualPropWarrenty	Intellectual prop warranty
198	confidentialityOfUser	Confidentiality of user
199	UCITAOverride	UCITA override
200	clickwrapModification	Click-wrap modification
201	indemnificationCode	Indemnification code
202	Indemnification	Indemnification
203	confdtyOfAgreement	Confidentiality of agreement
204	confdtyOfAgreementNote	Confidentiality of agreement note
205	governingLaw	Governing law
206	governingJurisdiction	Governing jurisdiction
207	applicableCopyrightLaw	Applicable Copyright law
208	curePeriodForBreach	Cure period for breach
209	curePeriodForBreachUOMCode	Cure period for breach UOM code
210	contentWarrenty	Content warranty
211	performanceWarrentyInd	Performance warranty indicator
212	performanceWarrenty	Performance warranty
213	updatimeGuarantee	Update time guarantee
214	maintenaceWindow	Maintenance window
215	renewalTypeCode	Renewal type
216	nonRenewalNoticePeriod	Non renewal notice period
217	nonRenewalNoticeCode	Non renewal notice code
218	licenseeTerminationRights	Licensee termination rights

Table 19. License Fields

	Internal Name	Display Name
219	licenseeTrmnConditionCode	Licensee trmn condition code
220	licenseeNoticePeriodOfTrmn	Licensee notice period of trmn
221	licenseeNoticePeriodOfTrmnCode	Licensee notice period of Trmn code
222	licensorTerminationRights	Licensor termination rights

Table 20. Local Acquisition Fields

	Internal Name	Display Name
225	instituteCode	Institute code (local ACQ)
226	(localAcquisition)budgets	Local ACQ budgets
227	costShare	Cost share
228	costSharePresentage	Cost share percentage
229	costShareDate	Cost share date

Table 21. Invoice Fields

	Internal Name	Display Name
235	invoiceCode	Invoice code
236	invoiceNumber	Invoice number
237	paymentStatus	Payment status
238	invoiceDate	Invoice date
239	paymentDate	Payment date

Report e-Products by Selection Status

The default output parameters of the **Report e-Products by Selection Status** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 22. Report e-Products by Selection Status

	Internal Name	Display Name
1	eproductType	e-Product type
2	(eproduct)instanceCode	instance Code
3	einterfaceTitle	e-Interface title
4	epackageTitle	e-Package title
5	econstituentTitle	e-Constituent title
6	estandaloneTitle	e-Standalone title
7	eproductIdentifier	Identifier
8	procurementStatus	Selection status
9	procurementStatusUpdateDate	Selection status update date
10	eproductStatus	e-Product status
11	acquisitionCode	Acquisition code

Report on e-Packages with Acquisitions

The default output parameters of the **Report on e-Packages with Acquisitions** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 23. Report on e-Packages with Acquisitions

	Internal Name	Display Name
1	acquisitionNumber	Acquisition number
2	acquisitionCode	Acquisition code
3	purchaseOrderNo	Purchase order no.
4	vendorCode	Vendor
5	vendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	orderDate	Order Date

Table 23. Report on e-Packages with Acquisitions

	Internal Name	Display Name
8	subscriptionStartDate	Subscription p. start date
9	subscriptionEndDate	Subscription p. end date
10	eproductTitle	e-Product title
11	eproductIdentifier	e-Product identifier
12	instanceCode	Instance code

Report on Locally Created e-Products

The default output parameters of the **Report on Locally Created e-Products** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 24. Report on Locally Created e-Products

	Internal Name	Display Name
1	eproductType	Product type
2	eproductTitle	e-Product title
3	eproductIdentifier	Identifier
4	eproductCode	e-product code
5	activationFromDate	Activation from date
6	activationToDate	Activation to date
7	creationDate	Creation date
8	workExpressionCode	Work expression code
9	(eproduct)instanceCode	Instance code

Report on e-Products with Usage Statistics

The default output parameters of the **Report on e-Products with Usage Statistics** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 25. Report on e-Products with Usage Statistics

	Internal Name	Display Name
1	eproductType	e-Product type
2	eproductTitle	e-Product title
3	eproductIdentifier	Identifier
4	eproductCode	e-product code
5	activationFromDate	Activation from date
6	activationToDate	Activation to date
7	creationDate	Creation date
8	workExpressionCode	Work expression code
9	(eproduct)instanceCode	Instance code=Instance code

Report of Active e-Products Without Licenses

The default output parameters of the **Report of Active e-Products Without Licenses** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
1	eproductType	e-Product type
2	eproductTitle	e-Product title

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
3	eproductIdentifier	e-Product identifier
4	eproductCode	e-Product code
5	workExpressionCode	Work expression code
6	(eproduct)instanceCode	Instance code
7	sourceInstanceCode	Source instance code
8	SFXID	SFX id
9	metaLibID	MetaLib id
10	otherID	Other id
11	otherSource	Other source
12	updateTarget	Update target
13	procurementStatus	Selection status
14	procurementStatusUpdateDate	Selection status update date
15	eproductStatus	e-Product status
16	eproductStatusUpdateDate	e-Product status update date
17	activityStatusDateFrom	Availability from
18	activityStatusDateTo	Availability to
19	privateNote	Private note
20	(eproduct)createdBy	Created by
21	(eproduct)creationDate	Creation date
22	(eproduct)updatedBy	Update by
23	updateDateCenter	Update center
24	updateDateLocal	Update local
25	activationFromDate	Activation from
26	activationToDate	Activation to
27	concurrentNumberOfUsers	Concurrent number of users
28	mainContact	Selector
29	sponseringLibrary	Sponsoring library
30	automaticUpdate	Automatic update
31	activityStatus	Availability

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
32	activityStatusDateNote	Activity status date note
33	publicNote	Public note
34	Suppress	Suppress
35	upCode	Up code
36	freeOrSubscription	Free or subscription
37	crossRefEnabled	Cross ref enabled
38	organizationCode	Organization code
39	Free	Free
50	localCoverage	Local coverage
51	coverageText	Coverage text
52	holdingsInILS	Holdings in ILS
53	holdingsNote	Holdings note
54	packageType	Package type
55	selectiveModeCode	Selective mode code
56	SFXID2	SFX id 2
57	JKEY	JKEY
58	titleKey	Title key
59	addedToPackage	Added to package
60	removedFromPackage	Removed from package
	License fields	
100	licenseCode	License code
101	licenseName	License name
102	typeCode	License type
103	methodCode	License method
104	(license)startDate	License start date
105	(license)endDate	License end date
106	executionDate	License execution date
107	licenseDuration	License duration
108	(license)statusCode	License status

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
109	statusNote	License status note
110	licensor	Licensor
111	originalLicensor	Original licensor
112	Licensee	Licensee
113	licensingAgent	Licensing agent
114	localLicenseNegotiator	Local license negotiator
115	deliveryRequirements	Delivery requirements
116	licenseURI	License URI
117	licenseURIType	License URI type
118	physicalLocation	Physical location
119	fileLocation	File location
120	vendorAdvancedNotice	Vendor advanced notice
121	vendorAdvancedNoticeVal	Vendor advanced notice value
122	noticePeriodCode	Notice period code
123	licensingNote	Licensing note
124	publicNote	Public note
125	replacedBy	Replaced by
126	Replaces	Replaces
127	linkedLicenseNote	Linked license note
128	renewCancMNote	Renew cancellation method Note
129	renewalDate	Renewal date
130	(license)createdBy	Created by
131	(license)updatedBy	Updated by
132	(license)createdDate	Created date
133	(license)updateDate	Update date
134	generalTermsNote	General terms note
135	userRestrictionsNote	User restrictions note
136	useRestrictionsNote	Use restrictions note

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
137	authorizesUserDef	Authorizes user definition
138	localSuthorizesUserDef	Local authorizes user definition
139	fairUseClauseCode	Fair use clause
140	allRightsReservedCode	All rights reserved code
141	dbProtectionOverrideCode	DB protection override code
142	citationRequirementDetails	Citation requirement details
143	digitalCopyCode	Digital copy code
144	digitalCopyTermNote	Digital copy term note
145	printCopy	Print copy
146	printCopyTermNote	Print copy term note
147	scholarySharing	Scholarly sharing
148	scholarySharingNote	Scholarly sharing note
149	distanceEducation	Distance education or fax code
150	distanceEducationTermNote	Distance education term note
151	intrLibPrintOrFaxCode	Intr lib print
152	intrLibSecureTransCode	Intr lib secure trans code
153	intrLibElectronicCode	Intr lib electronic code
154	intrLibKeepingRequiredCode	Intr lib keeping required code
155	intrLibTermNote	Intr lib term note
156	courseReservePrintCode	Course reserve print code
157	courseReserveElcORCashCode	Course reserve Electronic or cash code
158	courseReserveTermNote	Course reserve term note
159	electronicLinkCode	Electronic link code
160	electronicLinkTermNote	Electronic link term note
161	coursePackPrintCode	Course pack print code
162	coursePackElectronicCode	Course pack electronic code
163	coursePackTermNote	Course pack term note
164	remoteAccessCode	Remote access code

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
165	workinTermUseNote	Work in term use note
166	localUsePermission	Local use permission
167	perpetualAccessRights	Perpetual Access rights
168	perpetualAccessFrom	Perpetual access from
169	perpetualAccessTo	Perpetual access to
170	perpetualHoldingsNote	Perpetual holdings note
171	archivingRightsCode	Archiving rights code
172	archivingFormatCode	Archiving format code
173	archivingNote	Archiving note
174	accessabilityCompliance	Accessibility compliance
175	completenessOfContentCode	Completeness of content Code
176	concurrencyWithPrintCode	Concurrency with print code
177	intellectualPropWarrenty	Intellectual prop warranty
178	confidentialityOfUser	Confidentiality of user
179	UCITAOverride	UCITA override
180	clickwrapModification	Click-wrap modification
181	indemnificationCode	Indemnification code
182	Indemnification	Indemnification
183	confdtyOfAgreement	Confidentiality of agreement
184	confdtyOfAgreementNote	Confidentiality of agreement note
185	governingLaw	Governing law
186	governingJurisdiction	Governing jurisdiction
187	applicableCopyrightLaw	Applicable Copyright law
188	curePeriodForBreach	Cure period for breach
189	curePeriodForBreachUOMCode	Cure period for breach UOM code
190	contentWarrenty	Content warranty
191	performanceWarrentyInd	Performance warranty indicator

Table 26. Report of Active e-Products Without Licenses

	Internal Name	Display name
192	performanceWarrenty	Performance warranty
193	updatimeGuarantee	Update time guarantee
194	maintenaceWindow	Maintenance window
195	renewalTypeCode	Renewal type
196	nonRenewalNoticePeriod	Non renewal notice period
197	nonRenewalNoticeCode	Non renewal notice code
198	licenseeTerminationRights	Licensee termination rights
199	LicenseeTrmnConditionCode	Licensee trmn condition code
200	LicenseeNoticePeriodOfTrmn	Licensee notice period of trmn
201	LicenseeNoticePeriodOfTrmnCode	Licensee notice period of Trmn code
202	LicensorTerminationRights	Licensor termination rights

Report of IP Ranges by Licensor

The default output parameters of the **Report of IP Ranges by Licensor** are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 27. Report of IP Ranges by Licensor

	Internal Name	Display Name
1	InstanceCode	Instance
2	OrganizationCode	Institute
3	OrganizationName	Institute Name
4	Address	License Code
5	LicenseCode	License Code
6	LicenseName	License Name
7	Licensor	Licensor

Table 27. Report of IP Ranges by Licensor

	Internal Name	Display Name
8	LicAddress	Licensor Address
9	LicensorName	Licensor Name
10	IPRangeBegining	IP Range Beginning
11	IPRangeEnding	IP Range Ending
12	Excluding	Excluding
13	IPRangeType	IP Address Type
14	EproductTitle	e-Product Title

22

Tasks

This section includes:

- **About Verde Tasks** on page **219**
- **e-Product** on page **220**
- **Acquisition** on page **220**
- **Trial** on page **222**
- **License** on page **223**

About Verde Tasks

The following Verde tasks are available:

- e-Product
  - SFX Sync
- Acquisitions
  - Subscription renewal
  - Subscriptions for review
- Trial
  - Trial participant alerts
  - Trial management process
- License
  - License renewal

e-Product

SFX Sync

For information about the SFX sync task, see **Synchronizing e-Product Updates with SFX** on page **481**.

Acquisition

Subscription Renewal

This task retrieves all active acquisition records that are eligible for renewal and renews them.

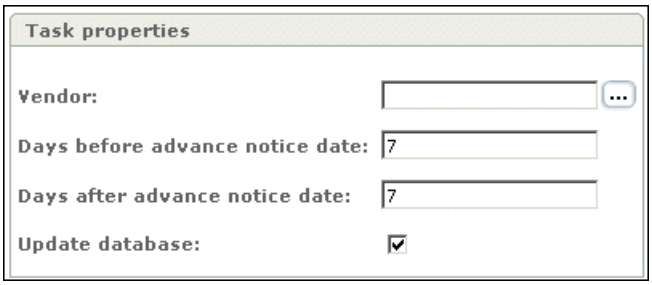


Figure 193. Acquisition – Subscription Renewal

An acquisition record is active if it has a status of **Active** or **Renewed**, an acquisition start date that is less than the current date, and an acquisition end date that is greater than the current date.

This task does the following:

- Triggers the renewal of licenses (**Automatic** renewal type) associated with the renewed acquisition records.
- Creates a new acquisition record. Fields that are inherited from the renewed record are:
  - Subscription open date
  - Vendor
  - Budgets
  - Advance notification period
  - Auto renewal
  - Print cancellation restrictions and note
  - Acquisition number

- Purchase order number
- Vendor subscription ID
- Subscription type
- Subscription type note
- Note for ILS
- Note for vendor
- Price
- Method of acquisition
- Material type
- Discount
- Pricing model
- Price cap
- Price cap period from and to
- Consortial agreement
- Pooled concurrent users
- Concurrent users note
- Create a new subscription record.
- Create new local acquisition records based on existing local acquisitions
- Link the same e-products to the new acquisition record

Input parameters for this task are:

- Vendor – Clicking the ellipsis on the right side of the field activates a pop-up window with a list of organizations (vendors).
- Number of days before/after advance notice date.
- Update database – If this box is not selected, the report can be run, and the output reviewed before running it again in update database mode.

Subscriptions for Review

This process retrieves all active acquisition records that are eligible for renewal but are not renewed automatically (renewal type is not **Automatic**) and initiates a review process on them.

The task parameters are the same as for **Subscription Renewal**. For details of these parameters, see **Subscription Renewal** on page **220**.

Trial

Trial Participant Alerts

Alerts are sent at the following intervals:

1. When the trial starts.
2. On the trial action date.
3. When the trial decision is due.
4. When the trial is over.
5. When the trial decision is made.

Note: The decision may be registered before the trial is over. The task requires no input parameters.

Trial Management Process

The trial management task is designed to perform changes according to the trial start and end dates.

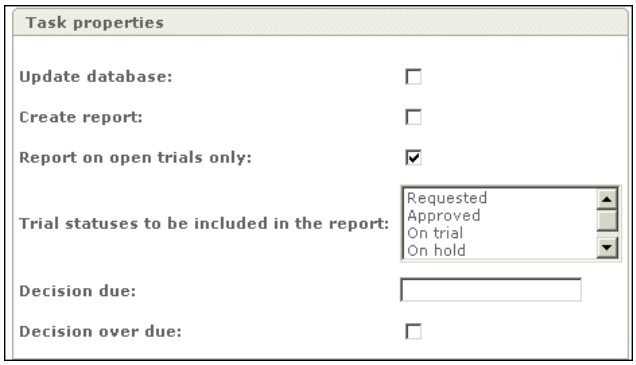


Figure 108: Trial Management Process Properties

This task performs the following changes:

- When the start date is reached, changes the status **Approved** to the status **On hold** or **On trial**.
- When the end date is reached, changes the status **On trial** to the status **Trial Over**

All other changes should to be conducted manually.

Input parameters are:

- **Update database** – If this check box is not selected, the report can be run, and the output reviewed before running it again in update database mode.

- **Create a report** – If the box is not selected, the report will be run, but the output file will be empty.
- **Report on open trials only**
- **Trial statuses to be included in the report**. One or many status options may be highlighted:
  - Requested
  - Approved
  - On trial
  - On hold
  - Trial over
- **Decision due**
- **Decision overdue**

License

License Renewal

This report allows for the selection of licenses that are eligible for renewal, and depending on the way in which renewal is set in the license, the report either renews the licenses automatically or reports on them.

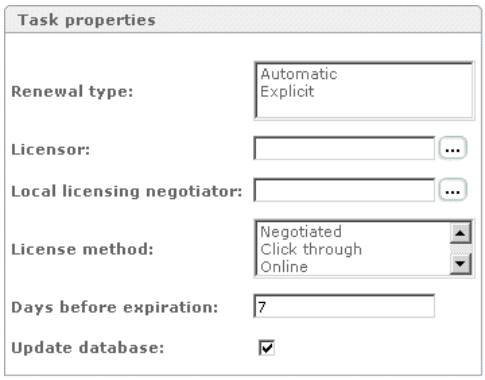


Figure 109: License Renewal Properties

The input parameter options are as follows:

- **Renewal type**. Possible values are:
  - Automatic
  - Explicit

- **Licensor** – Clicking the ellipsis on the right side of the field activates a pop-up window of organizations (licensors).
- **Local licensing negotiator** - Clicking the ellipsis on the right side of the field activates a pop-up window of contacts.
- **License method**. Possible values are:
  - Negotiated
  - Click through
  - Online
- **Days before expiration**
- **Update database** – If this box is not selected, the report can be run and the output reviewed before running it again in update database mode.

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View Task Output

This section includes:

- **e-Product** on page **225**
- **Acquisition** on page **226**
- **Trial** on page **227**
- **License** on page **228**

The View Task Output options and functionality are similar to those of the View Report Output, as described in **View Report Output** on page **197**.

e-Product

SFX Sync

The output file for the **SFX Synch** task cannot be customized. The default output parameters are listed in the table below.

Table 28. SFX Sync

	Internal Name	Display Name
1	eProduct Code	e-Product Code
2	eProduct Type	e-Product Type
3	Processing Date and Time	Processing Date and Time

Acquisition

Subscription Renewal

The default output parameters for the **Subscription Renewal** task are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 29. Subscription Renewal

	Internal Name	Display Name
1	AcquisitionNumber	Acquisition number
2	AcquisitionCode	Acquisition code
3	PurchaseOrderNo	Purchase order no.
4	VendorCode	Vendor
5	VendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	OrderDate	Order date
8	SubscriptionStartDate	Subscription p. start date
9	SubscriptionEndDate	Subscription p. end date
10	EproductTitle	e-Product title
11	EproductIdentifier	Identifier

Subscriptions for Review

The default output parameters for the **Subscriptions for Review** task are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 30. Subscriptions for Review

	Internal Name	Display Name
1	AcquisitionNumber	Acquisition number
2	AcquisitionCode	Acquisition code
3	PurchaseOrderNo	Purchase order no.
4	VendorCode	Vendor
5	VendorSubscriptionCode	Vendor subscription code
6	Price	Price
7	OrderDate	Order date
8	SubscriptionStartDate	Subscription start date
9	SubscriptionEndDate	Subscription end date
10	EproductTitle	e-Product title
11	EproductIdentifier	Identifier

Trial

Trial Participant Alerts

The default output parameters for the **Trial Participant Alerts** task are listed in the table below.

Note: The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 31. Trial Participant Alerts

	Internal Name	Display Name
1	EproductTitle	e-Product title
2	EproductIdentifier	e-Product identifier
3	StartDate	Start date
4	EndDate	End date
5	AlertType	Alert type

Table 31. Trial Participant Alerts

	Internal Name	Display Name
6	TrialCode	Trial code
7	Name	Trial participant name

Trial Management Process

The default output parameters for the **Trial Management Process** task are listed in the table below.

> **Note:** The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 32. Trial Management Process

	Internal Name	Display Name
1	EproductTitle	e-Product title
2	EproductIdentifier	Identifier
3	StartDate	Start date
4	EndDate	End date
5	StatusCode	Status
6	DecisionDate	Decision Due Date
7	DecisionStatusCode	Decision

License

License Renewal

The default output parameters for the **License Renewal** task are listed in the table below.

> **Note:** The output file can be customized. For details, see **Customized Report Outputs** on page **371**.

Table 33. License Renewal

	Internal Name	Display Name
1	LicenseCode	License code
2	LicenseName	License name
3	Licensee	Licensee
4	Licensor	Licensor
5	RenewalTypeCode	renewal type
6	LocalLicenseNegotiator	Local license negotiator
7	EndDate	License end date
8	EproductTitle	e-Product title
9	EproductIdentifier	Identifier

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Overview of Loaders

This section includes:

- **About Verde Loaders** on page **231**
- **Loader Workflow** on page **234**
- **Creating Input Files** on page **235**
- **Loading Input Files to Verde** on page **236**
- **Defining Input File and Load Output Settings** on page **238**

About Verde Loaders

Verde's loaders enable you to load e-product records, e-product attribute records (such as acquisition and license records), library records, and organization records to the Verde database.

Verde supports the following loaders:

- **e-Constituent** – The e-constituent loader enables you to create and update e-constituent records, one package at a time. In addition, the e-constituent loader creates new work records for e-constituents that have no corresponding work records. The loader also indexes the loaded e-constituents and their work records.

  The e-constituent loader does not update work records, or remove work records or e-products from Verde's database. Before loading the e-constituents, ensure that the e-constituent's e-package exists in Verde. If the e-package does not exist, follow the instructions in **The Quick Add Wizard** on page **64** for creating a new e-package record.

- **e-Standalone** - The e-standalone loader enables you to create and update e-standalone records and their related interfaces. It is possible to create and update several e-standalone records, related to different interfaces,

during one load. It is also possible to simultaneously create or update several e-standalone records that belong to the same interface.

In addition to creating and updating e-standalone records, the e-standalone loader creates new work records for e-standalone records if no corresponding work records exist in the KnowledgeBase. The loader also indexes the e-standalone records and their work records.

The e-standalone loader does not update work records or remove work records or e-products from Verde's database.

- **Acquisition** – The acquisition loader enables you to load new acquisition records to the Verde database. When loading acquisition records, each record must be associated with a single e-product. Therefore, before loading acquisition records, ensure that the acquisition's associated e-product exists in the Verde database.

  In addition to loading new acquisition records, the acquisition loader indexes the new acquisition records.

- **License** – The license loader enables you to create and update license records, including the license attachment in the Verde database. When loading license records, each new license record must be associated with a single e-product. Therefore, before loading license records, ensure that the license's associated e-product exists in the Verde database.

  In addition to creating and updating license records, the license loader indexes any new license records. The license loader loads licenses for all e-product types except e-print.

- **Library** – The library loader enables you to load library records of libraries belonging to your Verde instance. Additional loaders are used to load the contact records for each library, as well as the specific IP ranges for each library. Since library contacts and IP ranges are associated with a single library, ensure that the library record exists in the Verde database before you create library contacts and IP ranges for the library.

- **Organization** – The organization loader enables you to load records of organizations belonging to your Verde instance. Additional loaders are used to load the contact records for each organization. Since organization contacts are associated with a single organization, ensure that the organization record exists in the Verde database before you create the organization contacts for the organization.

- **Admin** – The admin loader enables you to load new admin records to the Verde database. When loading admin records, each record must be associated with a single e-product. Therefore, before loading admin records, ensure that the e-product associated with the admin record exists in the Verde database.

  An additional loader is used to load the local admin data for each admin record. Since local admin data is associated with a single admin record,

ensure that this admin record exists in the Verde database before you create the local admin record.

- **Access** – The access loader enables you to create and update access records in the Verde database. When loading access records, each record must be associated with a single e-product and with a specific access type. Therefore, before loading an access record, ensure that the e-product associated with the record exists in the Verde database.

  An additional loader is used to load the access authorization data for each access record. Since access authorization data is associated with a single access record, ensure that this access record exists in the Verde database before you create the access authorization record.

Verde also supports the **ALEPH Vendor Converter**, which enables Verde users who manage vendors in ALEPH to convert vendor and vendor contact data to Verde standard organization and organization contact files. These files can then be loaded to the Verde database using the organization and organization contact loaders.

Note: Although the relationships between the various loaders vary, the general workflow remains the same. Differences between the loaders are specified throughout the following sections, where relevant.

Loader Workflow

The general workflow when using the loaders is described in the following figure:

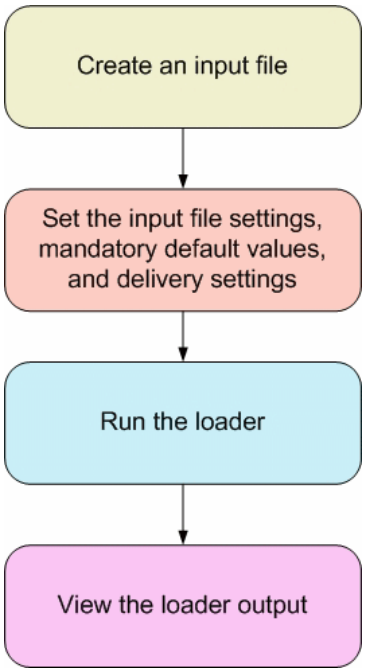
Create an input file
Set the input file settings, mandatory default values, and delivery settings
Run the loader
View the loader output

Figure 110: Loader Workflow

Using the loaders, you can upload an input file containing e-constituent, e-standalone, acquisition, license, library, organization, admin, or access records. Verde then does the following:

- Checks that the input file is in the correct format, including the heading names. For the detailed input file rules, see **Creating Input Files** on page **235**.
- Verifies that each row contains the mandatory information, and ensures that the dates and codes are in the correct format.
- Checks if a record matching the ID field exists in the database. This is discussed in more detail for each loader in **Creating Input Files** on page **235**.

Records that are validated are loaded into Verde's database. When a record is not validated, an error appears in the loader's log file. For more information on error possibilities, see **View Loader Output** on page **363**.

Creating Input Files

Before loading records into Verde, you must create an input file containing the data that needs to be loaded. Your input file can be an Excel file containing one worksheet or any comma delimited file (CSV).

An input file can be created based on one of Verde's input file templates. The input file contains columns for all of the available input file fields, with a header row for each column.

The input file fields are in one of the following formats:

- **Date** – All dates in the input files should be in the following format: dd/mm/yyyy.
- **Code** – For input file fields that accept a code value, enter the display name of the code. Verde automatically translates the display name into the relevant code.

Note: The display name can be modified from the **Code Tables** tab in the Admin module. For details, see **The Code Tables Tab** on page **403**.

- **Boolean** – For fields that accept a Boolean value, enter `True` or `False`, `1` or `0`, `Yes` or `No`.
- **Text** – Free text, limited to the field length.
- **Integer** – A number.
- **Float** – A number with two digits after the decimal point.
- **VarChar** – Text of an indeterminate length.

The template input files are located at `/exlibris/verde/<v2_1>/verde/examples_and_templates`, where `v2` is Verde's current version number and `1` is the slot where the system is installed on a specific port. For more information, consult your system administrator.

The input file fields and values for each of the following loaders are described in the following sections:

- e-Constituent – See **e-Constituent Input Files** on page **243**.
- e-Standalone – See .**e-Standalone Input Files** on page **257**.
- Acquisitions – See **Acquisition Input Files** on page **275**.
- Licenses – See **License Input Files** on page **281**.
- Libraries – See **About Library Input Files** on page **315**.
- Library Contacts – See **Library Contact Input Files** on page **321**.
- Library IPs – See **Library IP Input Files** on page **324**.

- Organizations – See **About Organization Input Files** on page **327**.
- Organization Contacts – See **Organization Contact Input Files** on page **331**.
- Admin – See **About Admin Input Files** on page **337**.
- Local Admin – See **About Local Admin Input Files** on page **345**.
- Access – See **About Access Input Files** on page **349**.
- Access Authorization – See **About Access Authorization Input Files** on page **357**.

The ALEPH Vendor Converter is described in the *ALEPH-Verde Interoperability Guide*.

Loading Input Files to Verde

The following steps describe how to load input files to Verde.

To load input files to Verde:

1 Create an input file for the type of loader that you are loading. You can base the input file on Verde's input file templates, which are located in the following directory:

`/exlibris/verde/<v2_1>/verde/examples_and_templates`

where `v2` is Verde's current version number and `1` is the specific port on which the system is installed. For more information, consult your system administrator.

For more information on creating input files, see **Creating Input Files** on page **235**.

2 From the **Select a tool** drop-down list in the KB Tools module, select **Loader**. The Loader menu appears.

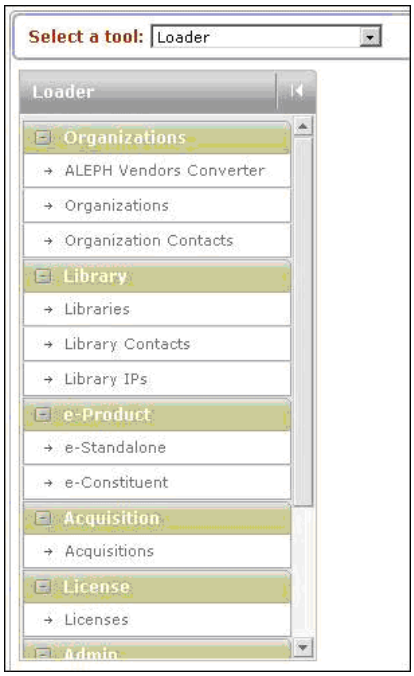

Figure 111: Loader Menu

3 From the **Loader** menu, select the type of loader that you want to use to load records. A screen displaying the loader's **Task Properties** and **Delivery Properties** appears.

Note: You can view this screen only if you have permissions to use the loader you selected.

4 Under **Task Properties**, enter the required values. For details on the fields that appear in this section, see **Defining Input File and Load Output Settings** on page **238**.

5 Under **Delivery Properties**, specify the properties of the output report, as described in the following table:

Table 34. Delivery Property Values

Field	Values
File format	The format of the output report that is sent. The possible formats are CSV, PRN, or XML files.

Table 34. Delivery Property Values

Field	Values
E-mail	An e-mail address to which the output report is sent. To enter more than one address, separate the addresses with semicolons (;).
Locally defined output	The format of the output report that is displayed in Verde. The default value is **Verde format**. For information on the **Default format** option (available for some loaders), see **About Customizing Report Outputs** on page **371**.
Report name	The name of the output report.

6 Click **Run** to run the loader immediately and upload the external input file.

Note: For information on viewing the loader's output file, see **Viewing Loader Output** on page **363**. For information on output file customization, see **Customized Report Outputs** on page **371**.

Defining Input File and Load Output Settings

The following fields are available in the **Task Properties** section for all loaders, except the acquisition loader:

Table 35. Common Task Property Fields

Field	Description
Update database	If this check box is selected, the data is loaded to the database. If this check box is cleared, a report is generated, but the data is not actually loaded to the database. This process is useful for validating the input file. It is recommended that you run the loading the first time as a report.
Input file	Choose one of the following two upload options, according to the location of your input file: ■ **File** – Click **Browse** to locate and select the input file, if the input file is located on your machine. ■ **Location on server** – Enter the path to the file, without browsing. **Note:** You cannot upload files that are larger than 400 MB.

The **organization contact** and **library contact** loaders contain the following additional field:

Table 36. Contacts Match Field

Field	Description
Contacts match	Determines whether Verde attempts to match contacts. The following options are available: ■ **Match input** – Verde attempts to match contacts with existing contacts in the database. If a match is found for the normalized contact name, Verde updates the contact information. Otherwise, Verde adds the contact as a new contact in the database. ■ **Add all as new** – Verde adds the contacts to the database as new contact records.

In addition, the **organization contact** loader contains the following field, which is similar to the additional field that appears for the **library IP** loader:

Table 37. Delete Existing Contacts/IPs Field

Field	Description
Delete existing contacts/IPs	If this check box is selected, the list of contacts/IPs is removed and the list of records in the input file replaces this list. If this check box is cleared, the list of contacts/IPs is added to the existing list.

The **e-constituent** loader contains the following additional fields:

Table 38. e-Constituent Loader Fields

Field	Description
Update package	If this check box is selected, the selected e-package record is updated and the e-constituent values for the **e-Package status**, **Selection status**, and **Activation from date** fields are assigned to the e-package.
Select package	Enables you to select an e-package from the list of Verde e-packages. Note that this is a mandatory field.
Other fields	See **e-Constituent Input File Fields** on page **246** for an explanation of the other fields in this screen. Note that you should define values for these fields only if you want to activate the e-package and e-interface during the loading process.

For an explanation of the additional fields displayed for the **license** loader, see the descriptions for the following fields in **License Input File Fields** on page 283:

- **License start date**
- **License end date**
- **License status**
- **Licensee**
- **Licensor**
- **Renewal type**

The **acquisition** loader's Task Properties section contains the following fields:

Table 39. Acquisition Loader Fields

Field	Corresponding Input File Field	Description
Match Type	ID	See **Acquisition Input File Fields** on page 276 for a description of this field.
Input File Format	—	Select one of the following formats: ■ Excel (XLS) ■ CSV
Input File Path	—	Enter the full path of the location from which the input file should be loaded.
Default Start Date	—	The date on which the acquisition becomes active. Enter a date or click the **Pick a Date** button to right of the text box to select a date from the calendar.
Default End Date	RenewCancDate	See **Acquisition Input File Fields** on page 276 for a description of this field.
Default Acquisitions Status	AcquisitionStatus	See **Acquisition Input File Fields** on page 276 for a description of this field.
Default Subscription Type	SubscriptionType	See **Acquisition Input File Fields** on page 276 for a description of this field.

Table 39. Acquisition Loader Fields

Field	Corresponding Input File Field	Description
Default Vendor	VendorCode	See **Acquisition Input File Fields** on page **276** for a description of this field.
Default Auto Renewal	AutoRenewal	See **Acquisition Input File Fields** on page **276** for a description of this field.

Note: For information on the ALEPH Vendor Converter settings, refer to the *ALEPH-Verde Interoperability Guide*.

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e-Constituent Input Files

This section includes:

- **About e-Constituent Input Files** on page **243**
- **e-Constituent Input File Rules** on page **243**
- **e-Constituent Input File Fields** on page **246**
- **e-Constituent Loader Workflow** on page **255**

About e-Constituent Input Files

Verde's e-constituent loader loads the e-constituent input file. This input file loads e-constituent records that need to be added to, or updated in, the Verde database. The e-constituent records in the input file must belong to the same e-package. The input file contains columns for the fields in the e-constituent and work records, as well as rows for each record being loaded. The e-constituent input file columns are described in **Table 43**.

Note: The e-constituent loader loads a single coverage per row. To load multiple coverage ranges, include a row per e-constituent-level coverage.
The e-constituent loader does not load institution-level coverage.

e-Constituent Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.

- If you want to create a work record associated with the new e-constituent record, the following fields are mandatory:
  - title - main title
  - e-product type

  For example, the following sample input file creates a new e-constituent record with minimal information provided in the input file:

Table 40. Sample Input File

Match	Title – Main Title	e-Product Type
	Exlibris news	CONFERENCES

- To update an e-constituent record, the **Match** field is mandatory. The **Match** field is either a bibliographic or Verde identifier used to identify the e-constituent or work record. The following example illustrates how to update e-constituents with coverage information:

Table 41. Update e-Constituents with Coverage Information

Match	From Year	To Year
LEP_1203348384027_94	2001	2005
LWE_1194878929338_2535	2002	

  The first constituent is identified by e-product code, the second by workexpression code. Both constituents belong to the same package.
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- All of the e-constituent record's fields can be updated, with the following exceptions:
  - The **Global coverage** and **JKEY** fields can never be updated in an e-constituent record.
  - The **SFX ID** and **Free/Subscription** fields cannot be updated for an e-product that is from the Central KB.
- For new records, when a field is left blank or a column is removed from the input file, the field is saved in the database as an empty field or as a default value.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.

- To remove a local coverage record, you must enter the value <NULL> in all the coverage fields (**From year**, **From month**, **From day**, and so forth. If you enter <NULL> in only some of the coverage fields, the local coverage record will not be removed.
- An input file row can contain a single, continuous coverage range that can include time intervals, and/or ranges of volumes and/or issues.

  For example, for specifying a coverage range for a title with a volume number and month, you can enter the volume number range and month range in the same row in the input file.

  For e-constituents that have non-continuous coverage ranges, include a row for each additional range. For example, when an e-constituent has coverage ranges from Volume 1 to Volume 15 and Volume 18 to Volume 20, the e-constituent's record contains the first coverage range in the input file record. The second coverage range is added in an additional record, which includes only the **Match** field and coverage range fields.

Table 42. e-Constituents with Non-Continuous Coverage Ranges

Input File Row	Match Fields	Coverage to Volume
1	0110-0990	1
2	0110-0990	18

- If you add new local coverage records, the existing coverage records will be removed.
- e-Constituent records that are part of aggregator packages inherit status information and dates from the e-constituents' parent e-packages. You should therefore not include e-product status or dates when loading e-constituent records to an aggregator package.

e-Constituent Input File Fields

The following table describes the fields of the e-constituent loader's input file.

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Match	Code	Work, e-Product		The match type can be one of the following: Bibliographic Identifier: ■ ISSN ■ eISSN ■ ISBN ■ eISBN Verde Identifier: ■ SFX internal ID ■ Verde e-product code ■ Verde work expression code **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	Yes – For updated e-constituent records

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Title – main title		Work		The title of the e-constituent being added to the Verde database.	Yes – For work records associated with new e-constituent records
Title – sub title		Work		The sub-title of the e-constituent being added to the Verde database.	
Title – number of part		Work		The part number included in the title of the e-constituent being added to the Verde database.	
e-Product type	Code	Work		The type of resource: ■ journal ■ book ■ citation ■ dissertation For a full list of the work record e-product types, see the table, **Work Record e-Product Types** on page 63.	Yes – For work records associated with new e-constituent records

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
ISSN		Work		The International Standard Serial Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	
EISSN		Work		The International Standard Serial Number for the electronic version of a Serial title. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
ISBN		Work		The International Standard Book Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	
eISBN		Work		The International Standard Book Number for the electronic version of a book. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	
Abbreviated title		Work		The e-constituent's abbreviated title.	
Imprint – place of publisher		Work		The place of publishing.	
Imprint - publisher		Work		The name of the publisher.	
e-Product format		Work		The format of the resource.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Local category – main category		Work		The main category of the resource assigned locally.	
Local category – sub category		Work		The sub category of the resource assigned locally.	
Local field <number>	Text	Work		One of the e-product's nine local fields.	
Selection status	Code	e-Product	30	The selection status of the e-product. The possible values are: ■ Evaluation ■ Review ■ Approved ■ Rejected ■ Withdrawn by Publisher ■ Null These values can be customized by editing the code table.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
e-Product status	Code	e-Product	30	The implementation status of the e-product. The possible values are: ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Production ■ Withdrawn ■ Null These values can be customized by editing the value in the code table. If this field contains a value, the **Activation from date** field must contain a value. Leave this field blank when loading e-constituents to an aggregator package.	
Activation from date	Date	e-Product	8	The date from which the e-product is active. If this field contains a value, the **e-Product status** field must contain a value.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Expiration date	Date	e-Product	8	The date until which the e-product is active. If this field contains a value, the **e-Product status** and **Activation from date** fields must contain values.	
Concurrent number of users	Integer	e-Product	10	Concurrent number of users for e-constituent.	
Sponsoring library	Text	e-Product	30	The library name of the library responsible for the e-product.	
Library contact	Text	e-Product	255	The library contact name of the contact in the library responsible for the e-product.	
Public note	Text	e-Product	2048	A note displayed in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.	
Internal note	Text	e-Product	2048	A note displayed to Verde staff only.	
SFX ID	Text	e-Product	20	Pointer to a matching record in SFX. For records that are part of the Global Knowledge Base, this value is set and cannot be updated manually.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
MetaLib ID	Text	e-Product	20	Pointer to a matching record in MetaLib.	
ID number	Text	e-Product	20	Pointer to a record ID in an alternate system.	
ID source	Text	e-Product	20	The name of the alternate system.	
Title key	Text	e-Product	20	A locally defined, abbreviated title that can be added to the URL for direct linking.	
Suppress	Boolean	e-Product	1	Indicates if the e-product is hidden from public view. Currently not functional.	
Free	Code	e-Product	35	Indicates whether the available resource is free of charge. The possible values are: ■ Free ■ Subscription	
From year	Text	e-Product	20	The year from which the electronic version is available.	
From month	Text	e-Product	20	The month from which the electronic version is available.	
From day	Text	e-Product	20	The day from which the electronic version is available.	
From volume	Text	e-Product	20	The volume from which the electronic version is available.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
From issue	Text	e-Product	20	The issue from which the electronic version is available.	
To volume	Text	e-Product	20	The volume until which the electronic version is available.	
To issue	Text	e-Product	20	The issue until which the electronic version is available.	
To year	Text	e-Product	20	The year until which the electronic version is available.	
To month	Text	e-Product	20	The month until which the electronic version is available.	
To day	Text	e-Product	20	The day until which the electronic version is available.	
Libraries names	Text	e-Product	900	The names of the libraries for which the e-product is active. Enter the library code; multiple library codes should have a comma between them. A library is registered only if the library settings of the e-constituent are different from its e-package. Update of a library's record will remove the existing library record. For more information on inheritance, see **Inheritance of e-Product Attribute Records** on page **55**.	

Table 43. e-Constituent Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Embargo – operator	Text	e-Product	1	The type of embargo: ■ From X months ■ Up to X months This is relevant to e-constituents and e-standalones.	
Embargo – months	Integer	e-Product	10	The number of months that are embargoed locally.	
Holdings note	Text	e-Product	255	A note regarding the holdings.	
ILS holdings ID	Text	e-Product	255	Link to MARC record in ILS.	

e-Constituent Loader Workflow

After Verde verifies that the e-constituent input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the ID field, as follows:

- If the **Match** field is an e-product, Verde searches the database for a matching e-product. If the e-product is found and is part of the package being loaded, Verde updates the e-product record. If no e-product record is found, and work information is provided in the input file, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.
- If the **Match** field is a work record, Verde searches for a matching work record. If the work is found and one of the associated e-constituents is an e-constituent of the package being loaded, Verde updates the e-constituent record. If no matching e-constituent is found for the work record, Verde creates a new e-constituent record linked to the work record. If no work record is found, Verde creates both the work records and its linked e-constituent record.

- For new records that include unique identifiers such as ISSN, eISSN, ISBN, and eISBN, Verde performs duplication checking. If the identifier does not exist in Verde's KB, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.

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e-Standalone Input Files

This section includes:

- **About e-Standalone Input Files** on page **257**
- **e-Standalone Input File Rules** on page **258**
- **e-Standalone Input File Fields** on page **261**
- **e-Standalone Loader Workflow** on page **274**

About e-Standalone Input Files

Verde's e-standalone loader loads the e-standalone input file. This file loads e-standalone records that need to be added to, or updated in the Verde database. The input file contains columns for the fields in the e-standalone e-product, as well as work records and rows for each record being loaded. A new e-standalone record can have its own e-interface record, or it can be linked to an e-interface record that is already in the database, or a record that was created in previous rows of the same input file. The input file thus includes several fields for the e-interface record. The e-standalone input file's columns are described in **Table 49**.

Note: The e-standalone loader loads a single coverage per row. To load multiple coverage ranges, include a row per e-standalone-level coverage.
The e-standalone loader does not load institution-level coverage.

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e-Standalone Input File Rules

Before loading your input file, ensure that the file follows these rules:

- All of the fields in the mandatory columns contain values. When an input line does not contain a value in a mandatory field, the line is rejected and an error is logged in the output report.
- If you are creating new e-standalone and e-interface records and want to create work records associated with these records, the following fields are mandatory:
  - title - main title
  - e-product type
  - interface name

  For example, the following sample input file creates two new e-standalone records associated with two new e-interface records:

Table 44. Creating Two e-Standalone Records

Match Standalone	Match Interface	Title-Main Title	e-Product Type	Interface Name
		Advanced SQL database	DATABASE	SQL Database interface
		CSA EconLit	DATABASE	CSA Illumina

- If you are adding new e-standalone records to existing e-interface records and want to create work records associated with the e-standalone records, the following fields are mandatory:
  - title - main title
  - e-product type
  - match interface – in order to identify the e-interface

  The following example illustrates how to add a new e-standalone (Football conference) record to an existing e-interface record (identified by CEP_1123333869159_611111):

Table 45. Adding e-Standalone Record to Existing e-Interface Record

Match Standalone	Match Interface	Title-Main Title	e-Product Type
	CEP_1123333869159_611111	Football conference	CONFERENCE

- To update an e-standalone record, enter the e-product code of the e-standalone record in the **Match Standalone** column and leave the **Match Interface** column empty.

  The following example illustrates how to update the selection status of an existing e-standalone record to **Evaluation**:

Table 46. Updating Selection Status to "Evaluation"

Match Standalone	Match Interface	Selection Status
LEP_1202041814089_74		Evaluation

- You can link several new e-standalone records to the same e-interface record in one input file. If the e-interface record does not exist in the Verde KnowledgeBase before the loading process, specify the name of the new e-interface record in the **Interface Name** column for the first e-standalone record appearing in the input file. Include the interface name in <> brackets in the **Match Interface** column for all subsequent e-standalone records in the same input file.

  The following example illustrates how to create six new e-standalone records linked to the new e-interface CSA Illumina record:

Table 47. Create Six e-Standalone Records Linked to the CSA Illumina Record

Match Standalone	Match Interface	Title-Main Title	e-Product Type	Interface Name
		CSA Aerospace & High Technology database	DATABASE	CSA Illumina
	<CSA Illumina>	CSA Agricultural and Environmental Biotechnology Abstracts	DATABASE	
	<CSA Illumina>	CSA Aluminum Industry Abstracts	DATABASE	
	<CSA Illumina>	CSA ANTE: Abstracts in New Technologies and Engineering	DATABASE	
	<CSA Illumina>	CSA ASFA 3: Aquatic Pollution and Environmental Quality	DATABASE	

Table 47. Create Six e-Standalone Records Linked to the CSA Illumina Record

Match Standalone	Match Interface	Title-Main Title	e-Product Type	Interface Name
	<CSA Illumina>	CSA Bacteriology Abstracts (Microbiology B)	DATABASE	

- The input file columns can be rearranged, and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- All of the e-standalone record's fields can be updated, with the following exceptions:
  - The **Global coverage** and **JKEY** fields can never be updated in an e-standalone record.
  - The **SFX ID** and **Free/Subscription** fields cannot be updated for an e-standalone that is from the Central KB.
- For new records, when a field is left blank or a column is removed from the input file, the field is saved in the database as an empty field or as a default value.
- If the same identifier already exists in database, the row will be rejected.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.
- To remove a local coverage record, you must enter the value `<NULL>` in all the coverage fields (**From year**, **From month**, **From day**, and so forth. If you enter `<NULL>` in only some of the coverage fields, the local coverage record will not be removed.
- An input file row can contain a single continuous coverage range that can include time intervals and/or ranges of volumes and/or issues.

  For example, for specifying a coverage range for a title with a volume number and month, you can enter the volume number range and month range in the same row in the input file.

  For e-standalones that have non-continuous coverage ranges, include a row for each additional range. For example, when an e-standalone has coverage ranges from Volume 1 to Volume 15 and Volume 18 to Volume 20, the e-standalone's record contains the first coverage range in the input file record. The second coverage range is added in an additional record, which includes only the **Match** field and the coverage range fields.

Table 48. e-Standalone with Non-Continuous Coverage Range

Input File Rows	Match Fields	Coverage from Volume	Coverage to Volume
1	0110-0990	1	15
2	0110-0990	18	20

- If you add new local coverage records, the existing coverage records will be removed.

e-Standalone Input File Fields

The following table describes the fields of the e-standalone loader's input file.

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Match standalone	Code	e-Product		Verde e-product code of e-standalone	Yes – For updated e-standalone records
Match interface	Code	e-Product		Verde e-product code of e-interface	Yes – For new e-standalone records linked to existing e-interface records
Title – main title		Work		The title of the e-standalone being added to the Verde database.	Yes – For work records associated with new e-standalone records
Title – sub title		Work		The sub-title of the e-standalone being added to the Verde database.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Title – number of part		Work		The part number included in the title of the e-constituent being added to the Verde database.	
e-Product type	Code	Work		The type of resource: ■ database ■ conference ■ citation ■ dissertation For a full list of the work record e-product types, see the table, **Work Record e-Product Types** on page 63.	Yes – For work records associated with new e-standalone records
ISSN		Work		The International Standard Serial Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
EISSN		Work		The International Standard Serial Number for the electronic version of a Serial title. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	
ISBN		Work		The International Standard Book Number is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
eISBN		Work		The International Standard Book Number for the electronic version of a book. This is a unique bibliographic identifier. Since data from the matching column is not used when creating a new work or e-product record, this field ensures that new work records have a bibliographic identifier.	
Abbreviated title		Work		The e-standalone's abbreviated title.	
Imprint – place of publisher		Work		The place of publishing.	
Imprint - publisher		Work		The name of the publisher.	
e-Product format		Work		The format of the resource.	
Local category – main category		Work		The main category of the resource assigned locally.	
Local category – sub category		Work		The sub-category of the resource assigned locally.	
Local field <number>	Text	Work		One of the e-product's nine local fields.	
LCCN		Work		Library of Congress Control number. A unique number assigned to a MARC record by the Library of Congress.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
CODEN		Work		The CODEN designation for a bibliographic title. (The CODEN is assigned by the International CODEN Section of Chemical Abstracts Service.)	
Author- name		Work		A personal name used as a main entry in a bibliographic record.	
Author- sub unit		Work		Numeration. A Roman numeral or a Roman numeral and a subsequent part of a forename.	
Author – number of part		Work		Number of part/ section of a work.	
Author – name of part		Work		Name of part/ section of a work.	
Corporate author - name		Work		A corporate name used as a main entry in a bibliographic record.	
Corporate author - Numerator		Work			
Corporate author – number of part		Work		Number of part/ section/meeting. A number designation for a meeting entered under a corporate name or for a part or section of a work used with a title in a name/title field	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Corporate author – name of part		Work		Name of part/ section of a work. A name designation of a part or section of a work used with a title in a name/title field	
Display title		Work		Display title.	
Update Frequency		Work		The current stated publication frequency of either an item or an update to an item. Dates are included when the beginning date of the current frequency is not the same as the beginning date of publication.	
Time Span		Work		Information on the type of report and the period covered by the report.	
Coverage note		Work		Coverage note	
Description		Work		Unformatted information that describes the scope and general contents of the materials. This could be a summary, abstract, annotation, review, or only a phrase describing the material.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Copyright		Work		Terms governing use and reproduction. Usually, the text of a legal or official statement of restrictions.	
Language		Work		Textual information on the language of the described materials.	
Continues		Work		Information concerning the immediate predecessor of the target item (chronological relationship).	
Continues By		Work		Information concerning the immediate successor to the target item (chronological relationship).	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
e-Product status	Code	e-Product	30	The implementation status of the e-product. The possible values are: ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Production ■ Withdrawn ■ Null These values can be customized by editing the code table. If this field contains a value, the **Activation from date** field must contain a value. When the e-standalone is activated during loading, if the related e-interface is inactive, it is given an e-product status of **Production** and an **Activation from date** that is the same as the **Activation from date** of the e-standalone.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Selection status	Code	e-Product	30	The selection status of the e-product. The possible values are: ■ Evaluation ■ Review ■ Approved ■ Rejected ■ Withdrawn by Publisher ■ Null These values can be customized by editing the code table.	
Activation from date	Date	e-Product	8	The date from which the e-product is active. If this field contains a value, the **e-Product status** field must contain a value.	
Expiration date	Date	e-Product	8	The date until which the e-product is active. If this field contains a value, the **e-Product status** and **Activation from date** fields must contain values.	
Concurrent number of users	Integer		10	Concurrent number of users for e-standalone.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Sponsoring library	Text	e-Product	30	The library name of the library responsible for the e-product.	
Library contact	Text	e-Product	255	The library contact name of the contact in the library responsible for the e-product.	
Public note	Text	e-Product	2048	A note displayed in external applications such as the OPAC, A-Z lists, and SFX. Currently not functional.	
Internal note	Text	e-Product	2048	A note displayed to Verde staff only.	
SFX ID	Text	e-Product	20	Pointer to a matching record in SFX. For records that are part of the Global Knowledge Base, this value is set and cannot be updated manually.	
MetaLib ID	Text	e-Product	20	Pointer to a matching record in MetaLib.	
ID number	Text	e-Product	20	Pointer to a record ID in an alternate system.	
ID source	Text	e-Product	20	The name of the alternate system.	
Title key	Text	e-Product	20	A locally defined, abbreviated title that can be added to the URL for direct linking.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Suppress	Boolean	e-Product	1	Indicates if the e-product is hidden from public view. Currently not functional.	
Free	Code	e-Product	35	Indicates whether the available resource is free of charge. The possible values are: ■ Free ■ Subscription	
From year	Text	e-Product	20	The year from which the electronic version is available.	
From month	Text	e-Product	20	The month from which the electronic version is available.	
From day	Text	e-Product	20	The day from which the electronic version is available.	
From volume	Text	e-Product	20	The volume from which the electronic version is available.	
From issue	Text	e-Product	20	The issue from which the electronic version is available.	
To volume	Text	e-Product	20	The volume until which the electronic version is available.	
To issue	Text	e-Product	20	The issue until which the electronic version is available.	
To year	Text	e-Product	20	The year until which the electronic version is available.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
To month	Text	e-Product	20	The month until which the electronic version is available.	
To day	Text	e-Product	20	The day until which the electronic version is available.	
Embargo – operator	Text	e-Product	1	The type of embargo: ■ From X months ■ Up to X months This is relevant to e-constituents and e-standalones.	
Embargo – months	Integer	e-Product	10	The number of months that are embargoed locally.	
Holdings note	Text	e-Product	255	A note regarding the holdings.	
ILS holdings ID	Text	e-Product	255	Link to MARC record in ILS.	
Libraries names	Text	e-Product	900	The names of the libraries for which the e-product is active. Enter the library code; multiple library codes should have a comma between them. Update of a library record will remove the existing library record.	

Table 49. e-Standalone Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Availability	Code	e-Product	10	Availability status. The possible values are: ■ Up ■ Down If the field contains the value **Down**, the **Availability from** and **Availability to** fields must contain values.	
Availability from	Date	e-Product		Start date of the period when the e-product will be unavailable.	
Availability to	Date	e-Product		End date of the period when the e-product will be unavailable	
Availability note	Text	e-Product	2048	Note to accompany availability status.	
Interface name	Text	Work		Title of interface for loaded e-standalone.	Yes – For work records associated with new e-interface records, when creating new e-standalone records
Update target	Code	e-Product	20	Indicates the system for update. The possible values are: ■ Null ■ SFX ■ SFX and MetaLib ■ MetaLib ■ ILS	

e-Standalone Loader Workflow

After checking that the e-standalone input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the ID field, as follows:

- Verde searches the database for a matching e-standalone.
  - If the e-standalone is found, Verde updates the e-standalone.
  - If the e-standalone is not found, Verde searches for a matching e-interface.
    - If a matching e-interface is found, Verde creates the e-standalone and connects it to the e-interface.
    - If a matching e-interface is not found, but work information is provided in the input file, Verde creates both a work and an e-product record for the e-standalone and e-interface. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.
- For new records that include unique identifiers such as ISSN, eISSN, ISBN, eISBN, Verde performs duplication checking. If the identifier does not exist in the Verde KB, Verde creates both work and e-product records. Otherwise, Verde rejects the row in the input file and writes an error to the loader's output file.

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Acquisition Input Files

This section includes:

- **About Acquisition Input Files** on page **275**
- **Acquisition Input File Rules** on page **275**
- **Acquisition Input File Fields** on page **276**
- **Acquisition Loader Workflow** on page **279**

About Acquisition Input Files

Verde's acquisition loader loads the acquisition input file. This input file loads acquisition records that need to be added to the Verde database. Each record must be associated with a single e-product, which is identified by the value in the **ID** field. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The acquisition input file's columns are described in **Table 50**.

Acquisition Input File Rules

Before loading your input file, ensure that the first column in the acquisition input file contains the ID or title that associates the record with the appropriate e-product.

Note: The acquisition input file columns cannot be removed from the file or rearranged, although fields can be left blank.

Acquisition Input File Fields

The following table describes the fields of the acquisition loader's input file.

Table 50. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description
ID	Code		The ID field is used to link the Acquisition to its e-product. This must always be the first column in the input file. **Note:** When the input file is loaded, the loader searches for the associated e-product. If more than one active e-product is found, the acquisition record is not loaded and an error is returned. There can be more than one associated e-product, but only one which is active. The ID can be any of the following: ■ Verde product code ■ SFX ID of the e-product (matches portfolio or target SFX internal ID) ■ Title of work – The title of the work. **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.
acquisitionStatus	Text	10	The status of the acquisition record.
acquisitionStatusDate	Date	8	The date on which the acquisition status was assigned.
orderDate	Date	8	The date on which the acquisition was ordered.
vendorCode	Text	30	The vendor code.
budgets	Text	500	The name of the budget or fund that is paying for the subscription.

Table 50. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description
subscriptionNotification	Integer	10	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.
autorenewal	Boolean	1	Indicates whether renewal is automatic or explicit. Possible values are **1=Yes** and **0=No**
advanceNoticeDate	Date	8	Calculated by the system based on the advance notification period and the acquisition end date.
renewCancDate	Date	8	The date on which the subscription expires if it is not renewed.
renewCancDecisionNote	Text	500	The reason for canceling or renewing the subscription.
renewCancNoteILS	Text	500	Additional information for ILS, about renewing or canceling the subscription.
renewCancNoteVendor	Text	500	Additional information for the vendor, about renewing or canceling the subscription.
printCancelRestriction	Boolean	1	Restrictions on canceling print versions of electronic titles covered by a license.
printCancelNote	Text	500	Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license.
purchaseOrderNo	Text	50	The number assigned to the purchase order of a product.
vendorSubscriptionCode	Text	30	The ID of the vendor subscription.
materialType	Text	30	Material type.
subscriptionType	Text	30	Subscription type.
subscriptionTypeNote	Text	500	Subscription type note.
noteForILS	Text	500	Note for ILS.
noteForVendor	Text	500	Note to be included in correspondence with vendor.
price	Float	126	The amount paid for the product.

Table 50. Acquisition Input File Fields

Field Name	Type of Field	Field Length	Description
acquisitionMethod	Text	10	Method of acquisition.
discountPrice	Float	10	A discount in price or in pricing formula.
pricingModel	Text	250	A description of the fee structure applicable to the product.
pricingCap	Float	10	The maximum percentage of annual increase in a multi-year agreement.
pricingCapFrom	Date	8	Dates on which the price cap begins.
pricingCapTo	Date	8	Dates on which the price cap ends.
inflationRate	Float	126	The inflation rate (defined in percentage terms).
consortialAgreement	Boolean	1	Indicates whether an acquisition falls under a multi-party agreement that uses the same license for all parties.
pooledConcurrentUsers	Integer	10	The number of concurrent users if shared across a consortium rather than within a specific institution.
concurrentUsersNote	Text	500	A specific explanation of how users are allocated or shared if pooled or platform-based. Additional information about the number of concurrent users.
listPrice	Float	126	The list price for the subscription.
netPrice	Float	126	The net price of the subscription.
Currency	Text	10	The currency in which the subscription is paid.

Acquisition Loader Workflow

After Verde verifies that the acquisition input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for an e-product in the database that matches the ID or title. An acquisition record is then created for this e-product. Verde searches for one of the following types of identifiers in the database:

- Verde e-product code
- SFX ID of e-product
- Title of work

If Verde retrieves matches for more than one active e-product, the acquisition record is not loaded. There can be more than one match, but only one active match.

In addition, acquisition records are not loaded if there is already an acquisition record with an overlapping subscription period, which can be any of the following:

- The start date of the acquisition record being loaded is the same as or after the end date of any existing subscription records.
- The acquisition record dates are as follows:
  - The start date of the acquisition record being loaded is before or on the same date as an existing subscription record.
  - The end date of the subscription record is after any existing subscription start dates.
- The end date of the subscription is before the existing start date.

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License Input Files

This section includes:

- **About License Input Files** on page **281**
- **License Input File Rules** on page **281**
- **License Input File Fields** on page **283**
- **License Loader Workflow** on page **313**

About License Input Files

Verde's license loader loads the license input file. This input file loads license records, which need to be added to, or updated in, the Verde database. The input file contains columns for the license fields for each record being loaded. A new license record must be associated with a single e-product that should be identified in the **Match** column. An updated license must be identified in the **Match** column with a license code. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The license input file's columns are described in **Table 53**.

License Input File Rules

Before loading your input file, ensure that it follows these rules:

- The input file includes the **Match** column. The **Match** field is mandatory both for new and updated licenses. When an input file does not contain a **Match** column, the file is not loaded to Verde and an error is logged in the summary.
- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields and no default values are defined, the input line is rejected and an error is logged in the output report.

- For new licenses, the matching field is either a bibliographic or Verde identifier used to identify the e-product associated with the license.

  For example, the following sample file creates four new licenses with minimal input information. The e-product for the first license is identified by e-product code, the second e-product by SFX ID, the third by workexpression code, the fourth by title.

Table 51. Four New Licenses

Match	License Method	License Status	License Start Date	License End Date	Licensed Execution Date	Licensor	Licensee
CEP_1123340540996_952680	Manifest assent	In negotiation	10/12/2008	31/12/2008	31/12/2008	OVID	Art Library
111089394066000	Online	Under review	10/12/2008	10/12/2009		ABI	Music Library
CWE_1123334167035_611274	Negotiated	New					
Advanced Multivariate Statistics with Matrices	Click through	New					

- For an updated license, the matching field is a license code used to identify the license to be updated. The following example illustrates how to update a license with perpetual coverage information. The license to be updated is identified by license code.

Table 52. Updating a License with Perpetual Coverage Information

Match	Pepetual Coverage From	Perpetual Coverage To
LIC1187856352455_20	10/12/2007	10/06/2008

- The following fields are mandatory for a new license: **License status**, **License renewal type**, and **License type**. If these values/columns are missing in the input file, default values are assigned to the new license.
- Some fields are mandatory for several license statuses. For a full list of mandatory fields for each license status, see the license dependencies table.
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.

- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering <NULL> in the appropriate column in the input file.

License Input File Fields

The following table describes the input file fields of the license loader.

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Match		Work / e-product/ license		For a new license, must be one of the following: ■ title ■ workexpression code ■ Verde e-product code ■ SFX ID of associated e-product ■ For updated license, it must be: ■ license code **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in a general or number format, Excel does not store any digits past the 15th digit and the data is lost.	Yes

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Type	Code	License	30	The type of license. The possible values are: ■ Regular ■ Trial ■ Supplemental ■ Prevailing These fields can be customized by modfying the code table. If left blank, a license of type **Regular** will be created.	Yes – For a new license
License name	Text	License	100	The locally assigned name of the license agreement.	
License method	Code	License	30	License method. The possible values are: ■ Click through ■ Manifest assent ■ Negotiated ■ Online ■ Shrinkwrap These fields can be customized in the code table. If left blank, the default value is saved.	Yes – For a new license
License start date	Date	License	8	The start date of the license.	Yes – For several license statuses
License end date	Date	License	8	The end date of the license.	Yes – For several license statuses

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Renewal date	Date	License	8	Date of renewal.	
License execution date	Date	License	8	The date on which the license was executed.	Yes – For several license statuses
Standard duration	Integer	License	10	The period of time covered by the license agreement. Used when licenses are renewed. Can be defined in weeks, months, and years.	
Standard duration value	Code	License	30	The period of time covered by the license agreement. The possible values are: ■ Weeks ■ Months ■ Years. These fields can be customized in the code table.	
Vendor Advance notice	Integer	License	10	The amount of time before the license expires by which you need to cancel your subscription. This can be defined in one of the following measurements: ■ Weeks ■ Months ■ Years. The measurement is defined according to the value of the **Vendor Advance notice** value	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Vendor Advance notice value	Code	License	30	The measurement used for **Vendor advance notice**. The possible values are: ■ Days ■ Weeks ■ Months These fields can be customized in the code table.	
Renewal type	Code	License	30	A clause that specifies whether renewal is automatic or explicit. The possible values are: ■ Automatic ■ Explicit ■ Perpetual These fields can be customized in the code table. If left blank, the default value is saved.	Yes – For a new license
License URI	Text	License	255	The Uniform Resource Identifier at which the license agreement is made available.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
License URI type	Text	License	30	The type of Uniform Resource Identifier being used to locate the license agreement. The possible values are: ■ URI ■ URL ■ URN These fields can be customized in the code table.	
Physical license location	Code	License	250	The place in which a printed or other tangible instance of the license is stored.	
Electronic file location	Text	License	250	Contains the file location of the electronic version of the license.	
Auto-renewal cancellation period	Integer	License	10	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Auto-renewal cancellation period value	Code	License	30	The time interval in which the **Non-Renewal Notice Period** is measured. The possible values are: ■ Days ■ Weeks ■ Months These fields can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
License status	Code	License	30	The status of the license. Possible values are: ■ New ■ In negotiation ■ Under review ■ Under local review ■ Pending local response ■ Pending licensor response ■ Awaiting vendor generic license ■ Redacted version created ■ Electronic version created ■ Awaiting local signature ■ Final legal version received ■ Approved ■ Pending final local signature ■ Retired ■ Pending final signature by licensor ■ Approved locally ■ Rejected If left blank, the default value is saved. These values can be customized in the code table.	Yes – For a new license

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
License status note	Text	License	750	Note field that contains additional information regarding the license status.	
Licensor	Text	License	30	The person who granted the license. The party who formulates the terms and conditions of use for the product, with whom the licensee (purchaser) is bound in contract by signing or otherwise assenting to a license agreement.	
Original licensor	Text	License	30	The original organization granting the license.	
Licensee	Text	License	30	The person to whom the license is granted. The legal party that signs or otherwise assents to the license.	
Licensing agent	Text	License	30	An organization (such as a subscription agent) or individual that facilitates a licensing transaction on behalf of one or more parties.	
Local licensing negotiator	Text	License	30	The name of the local person responsible for negotiating the license.	
Licensee delivery requirements	Text	License	500	The required medium in which official communications must be delivered.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Licensing note	Text	License	750	Additional information regarding the license, the negotiation of the license, the product, and so on.	
Public note	Text	License	750	Additional information regarding the resource that is intended for public use.	
License replaced by	Text	License	30	The new license.	
License replaces	Text	License	30	The previous license.	
License history note	Text	License	500	Additional information about accessing the licenses.	
General terms note	Text	License	750	Notes about the terms in the business agreement (of the license as a whole).	
User restriction note	Text	License	750	Additional information about other user restrictions not adequately described elsewhere. For example, restrictions on users located outside the United States or the country in which the institution is located.	
Use restriction note	Text	License	750	Indicates whether to use a restriction note.	
Authorized user definition	Text	License	750	The group of users allowed to use the Electronic Product, as defined in the contract.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Local authorized user definition	Boolean	License	1	The inclusion of an institution-specific preferred authorized user definition.	
ILL print or fax	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of printed copies or facsimile transmissions. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
ILL secure electronic transmission	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of secure electronic transmissions. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
ILL electronic	Code	License	30	The right to provide the licensed materials via interlibrary loan by way of electronic copies. The possible values are: ■ Null – Field left blank. ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
ILL record keeping required	Boolean	License	1	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request.	
ILL term note	Text	License	750	Additional information related to interlibrary loans.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Fair use clause indicator	Boolean	License	1	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law.	
All rights reserved indicator	Boolean	License	1	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor.	
Data protection override	Boolean	License	1	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law.	
Citation requirement detail	Text	License	255	A specification of the required or recommended form of citation.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Digital copy	Code	License	30	The right of the licensee and authorized users to download and digitally copy a reasonable portion of the licensed materials. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Digital copy term note	Text	License	750	Information that qualifies a permissions statement on a digital copy.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Print copy	Code	License	255	The right of the licensee and authorized users to print a portion of the licensed materials. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Print copy term note	Text	License	750	Information that qualifies a permissions statement on print copy.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Scholarly sharing	Code	License	255	The right of authorized users and/or the licensee to transmit a hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific, or professional use. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Scholarly sharing term note	Text	License	750	Information that qualifies a permissions statement on Scholarly Sharing.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Distance education	Code	License	255	The right to use licensed materials in distance education. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Distance education term note	Text	License	750	Information that qualifies a permissions statement on distance education.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Course reserve print	Code	License	30	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Course reserve electronic/ cached	Code	License	30	The right to make electronic copies of the licensed materials and store them on a secure network. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Course reserve term note	Text	License	750	Information that qualifies a permissions statement on course reserves.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Electronic link	Code	License	30	The right to access the licensed material. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Electronic link term note	Text	License	750	Information that qualifies a permissions statement on electronic links.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Course pack	Code	License	30	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Course pack electronic	Code	License	30	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction. The possible values are: ■ Null – Field left blank ■ Not applicable ■ Permitted (explicit) ■ Permitted (interpreted) ■ Prohibited (explicit) ■ Prohibited (interpreted) ■ Silent These values can be customized in the code table.	
Course pack term note	Text	License	750	Information that qualifies a permissions statement on Course Packs.	
Remote access	Number	License	1	The right of an authorized user to gain access to an Electronic Product from an offsite location.	
Walk-in term use note	Text	License	750	Information that qualifies the status or permitted actions of Walk-In Users.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Perpetual access rights	Code	License	30	The right to permanently access the licensed materials paid for during the period of the license agreement. The possible values are: ■ Null – Field left blank ■ No ■ Undetermined ■ Yes These values can be customized in the code table.	
Perpetual coverage from	Date	License	8	The date from which there is perpetual access.	
Perpetual coverage to	Date	License	8	The date until which there is perpetual access.	
Perpetual coverage note	Text	License	750	Note about perpetual holdings.	
Archiving rights	Code	License	30	The right to permanently retain an electronic copy of the licensed materials. The possible values are: ■ Null – Field left blank ■ No ■ Undetermined ■ Yes These values can be customized in the code table.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Archiving format	Code	License	30	The format of the archival content. The possible values are: ■ Null – Field left blank ■ CDROM ■ Remote ■ Tape ■ Unspecified tangible format These values can be customized in the code table.	
Archiving note	Text	License	750	Additional information related to archiving rights, product, and format.	
Accessibility compliance	Boolean	License	1	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation.	
Completeness of content clause	Text	License	30	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the equivalent print version. Possible values are: **Present**, **Absent**.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Concurrency with print version	Text	License	30	The presence of a provision in the contract stating that the licensed materials are available before, or no later than the equivalent print version, and/or are kept current. Possible values are: **Present**, **Absent**.	
Intellectual property warranty	Boolean	License	1	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties.	
User information confidentiality	Boolean	License	1	The requirement that user data should not be shared with third parties, reused, or resold without permission.	
UCITA override clause indicator	Boolean	License	1	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Click-wrap modification	Boolean	License	1	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement; or terms of use residing on the provider's server that might otherwise function as a contract of adhesion.	
Indemnification by licensor	Code	License	30	A clause by which the licensor agrees to indemnify the licensee against a legal claim. The possible values are: ■ Null – Field left blank ■ General ■ Intellectual property only ■ Other These values can be customized in the code table.	
Indemnification by licensor indicator	Boolean	License	1	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Confidentiality of agreement	Code	License	255	The presence or absence of clauses that specify or detail restrictions on the sharing of the terms of the license agreement. The possible values are: ■ Null – Field left blank ■ All ■ All but user terms ■ Financial only ■ No These values can be customized in the code table.	
Confidentiality note	Text	License	750	Specific details about what aspects of the license are private.	
Governing law	Text	License	255	A clause specifying the governing law to be used in the event of an alleged breach of the agreement.	
Governing jurisdiction	Text	License	255	The venue or jurisdiction to be used in the event of an alleged breach of the agreement.	
Applicable copyright law	Text	License	255	A clause that specifies the national copyright law agreed to in the contract.	
Cure period for breach	Integer	License	10	The cure period for an alleged material breach.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Cure period for breach value	Code	License	30	The time interval that measures the **Cure Period for Breach**. The possible values are: ■ Days ■ Weeks ■ Months These fields can be customized in the code table.	
Content warranty	Text	License	750	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the resource is materially diminished.	
Performance warranty	Boolean	License	1	Indicates whether a clause that requires a satisfactory level of online availability and/or response time is present.	
Uptime guarantee	Text	License	750	Uptime guarantee notes	
Maintenance window	Text	License	750	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.	
Licensee termination rights	Boolean	License	1	The ability of the licensee to terminate an acquisition during a contract period.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Licensee termination condition	Code	License	30	The condition under which the licensee terminated an acquisition during a contract period. The possible values are: ■ Null – Field left blank ■ At will ■ Breach by licensor ■ Other These values can be customized in the code table.	
Licensee termination notice period	Integer	License	10	The time interval in which the **Licensee Notice Period for Termination** by the library is measured.	
Licensee termination notice period value	Code	License	30	The amount of advance notice required prior to contract termination by the licensee. The possible values are: ■ Days ■ Weeks ■ Months These fields can be customized in the code table.	
Licensor termination rights	Boolean	License	1	The ability of a Licensor to terminate an acquisition during a contract period.	

Table 53. License Input File Fields

Field Name	Type of Field	Record Type	Field Length	Description	Mandatory Field
Licensor termination condition	Text	License	30	The conditions under which the licensor terminated an acquisition during a contract period.	
Licensor termination notice period		License	4	The amount of advance notice required prior to contract termination by the licensor.	
Licensor termination notice period operator	Text	License	30	The time interval in which the licensor notice period for termination is measured.	
Termination right note	Text	License	750	Additional information necessary for specifications of termination rights.	
Termination requirement note	Text	License	750	A clarification of the termination requirements and what certification of the requirement activities is necessary.	
Attachment full path	Text	License	255	Full path of license attachment on the server. For loading multiple license attachments, insert paths separated by semicolons (;) Make sure that the full path can be reached from the Verde server. To delete a license attachment, set the value to <NULL>.	

License Loader Workflow

After Verde verifies that the license input file is in the correct format and includes mandatory columns, Verde examines the value in the **Match** column.

- If the **Match** column value is a title, workexpression code, SFX ID, or e-product code, Verde searches for a related e-product.
  - If no match is found, the line is rejected.
  - If Verde retrieves matches for more than one e-product, the line is rejected.
  - If only one related e-product is found, Verde verifies that values exist for the mandatory fields. If the input file includes mandatory fields, the program progresses to the next stage. If a field is blank or a column is removed from the input file, the default value is saved in the database. The default values are taken from two areas:
    - The program first checks the default values defined in the Task Properties screen. If these values are defined, they are saved in the database.
    - If values are not defined in the Task Properties screen, Verde checks whether the license parameters defined in **Admin > Default Values** are saved in the database. For more information, see **The Default Values Tab** on page **417**.

Note: The input file value always overwrites a default value.

- If the **Match** column value is the license code, Verde searches for an updated license. If no match is found, the line is rejected. If a match found, the program goes to the next stage.
- For new and updated licenses, Verde performs a dependency check. Some license fields may be mandatory, depending on license status. For details, see the following table.

Table 54. Mandatory Fields for License Statuses

License Status	Mandatory Fields
New	
Approved	License start date, License end date, License execution date, Vendor advance notice, Licensor, Licensee
Retired	License start date, License execution date, Vendor advance notice, Licensor, Licensee

Table 54. Mandatory Fields for License Statuses

License Status	Mandatory Fields
Active or Inactive (for prevailing license only)	License start date, License end date
Other statuses	Licensor, Licensee

- For an updated license, Verde updates the license, with the following exceptions:
  - Licenses with **Approved** and **Retired** statuses cannot be updated.
  - You cannot change the license type from **Prevailing** to another type and vice versa.
  - A **Prevailing** license type can be created only if the associated e-product already has more than one active license (license with **Approved** status).

Note: For records being updated, default values are not taken into account.

29

Library, Library Contact, and Library IP Input Files

This section includes:

- **Library Input File Rules** on page **315**
- **Library Input File Fields** on page **317**
- **Library Loader Workflow** on page **320**
- **Library Contact Input Files** on page **321**
- **Library Contact Input File Fields** on page **321**
- **Library Contact Loader Workflow** on page **324**
- **Library IP Input Files** on page **324**
- **Library IP Input File Fields** on page **325**

About Library Input Files

Verde's library loader loads the library input file. This input file loads library records that need to be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The library input file's columns are described in **Table 57**.

Library Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes mandatory columns. When an input file does not contain all mandatory columns, the input file is not loaded to Verde and an error is logged in the summary.

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.
- For new records, the following fields are mandatory:
  - **Library code**
  - **Library name**

  For example, the following sample file creates two new libraries with minimal input information:

Table 55. Two New Libraries

Library Code	Library Name
555	Art Library
456	Music Library

- For updated records, the **Library code** is a mandatory field (so that the library can be identified for update).

  The following example illustrates how to update a library record with default library access information:

Table 56. Update Library Record with Default Library Access Information

Library Code	Library Name	Default Library Access
555	Art Library	1
456	Music Library	0

  After loading, the default library access will be updated to **Include** for **Art Library** and **Exclude** for **Music Library**.
- The input file columns can be rearranged and columns can be removed from the input file. The text of the column's header cannot be modified.
- The columns in the input file may contain any of the fields available for library, IP range, or contact records.
- For new records, when a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.

Library Input File Fields

The following table describes the input file fields for the library loader.

Table 57. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Library code	Text	30	The library code. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	Yes
Library name	Text	100	The display name of the library.	Yes
Alternate name1	Text	100	An alternate name used for the library. The library can have up to three different alternate names.	
Alternate name2	Text	100	An alternate name used for the library.	
Alternate name 3	Text	100	An alternate name used for the library.	
Default library access	Boolean	1	Indicates whether by default resources are active or inactive for this library. The default values are 0 or 1 where: ■ 0=Exclude ■ 1=Include If left blank, the default **Include** value is saved.	
Instance abbreviation	VarChar	10	The instance's abbreviated title.	

Table 57. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Guest member	Boolean	1	Relevant only for consortia. Indicates whether the library's resources are managed by the center without the library having its own Verde instances. Values are **0** or **1** where **0** is **No** and **1** is **Yes**. The default is **No**.	
Related instance	VarChar	30	Relevant only for consortia. Maps the library to a certain Verde instance. This is used only in a multi-shared instance system.	
Street	Text	100	The street name in the library's address.	
City	Text	50	The city in which the library is located.	
State/Province	Text	50	The state or province in which the library is located.	
Country	Text	50	The country in which the library is located.	
Postal code	Text	15	The zip code in the library's address.	
SFX institute code	Text	30	The institute code used to identify the library in SFX.	
Role note	Text	255	Additional information regarding the library role.	
Full time employees	Integer	10	The number of full time employees on staff at the library.	

Table 57. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Faculty	Integer	10	The number of full time faculty members at the library.	
Graduate students	Integer	10	The number of graduate students that belong to the library.	
Undergraduate students	Integer	10	The number of undergraduate students that belong to the library.	
Note	Text	500	Additional information about the library.	
Proxy server use flag	Code	30	Indicates the use of a proxy server. The possible values are: ■ Null – Field left blank ■ IP Selective – Indicates IP selective ■ No – Indicates that a proxy server is not used ■ Selective – Indicates selective use of the proxy server ■ Yes – Indicates the use of a proxy server	

Table 57. Library Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Proxy server type	Code	30	The type of proxy server used (when the Proxy server use flag field is not null). The possible values are: ■ Null – Field left blank ■ EZ proxy – Indicates the EZ proxy being used ■ Library proxy – Indicates the library proxy being used ■ Other – Indicates another proxy type is used ■ SQUID – Indicates SQUID is being used ■ WAM – Indicates WAM is being used	
Proxy prepend string	VarChar	250	A string to add to the URL going to the proxy server.	
Proxy server note	Text	500	Additional information regarding the library's proxy server.	

Library Loader Workflow

After Verde verifies that the library input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the **Library code** field. If the library is found, Verde updates the library record. If no library record is found, Verde creates a new library record, provided all the mandatory information for creating a new library record is supplied in the input file.

When a library code is added or updated more than once in an input file, the values specified in the last update are saved in the database.

Library Contact Input Files

Verde's library contact loader loads the library contact input file. This input file contains a list of library contact records for an existing library that need to be added to, or updated in, the Verde database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded.

Since library contacts are associated with a specific library, ensure that the library record exists in the Verde database before you load library contacts for the library. The library contact input file's columns are described in **Table 58**. The library contact input file has the same rules as the library input file. For a description of these rules, see **Library Input File Rules** on page **315**.

Library Contact Input File Fields

The following table describes the input file fields for the library contact loader.

Table 58. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Library code	Text	30	The code of the library in Verde with which the library contact record is associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	Yes
Contact name	Text	30	The library contact's name.	Yes
Job title	Text	30	The library contact's job title.	
Email	Text	30	The library contact's e-mail address.	Yes
Phone No.	Text	30	The library contact's phone number.	
Alternate phone No.	Text	30	The library contact's secondary phone number.	
Fax No.	Text	30	The library contact's fax number.	
Street	Text	100	The name of the street in the library contact's address.	

Table 58. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
City	Text	50	The city in the library contact's address.	
State/Province	Text	50	The province in the library contact's address.	
Country	Text	50	The country in the library contact's address.	
Postal code	Text	15	The zip code in the library contact's address.	
Main contact	Boolean	1	The library's main contact. There are two possible values: **1 (Yes)** or **0 (No)**. If left blank, the default value, **0**, is saved. Note that only one contact per library can be defined as the main contact.	

Table 58. Library Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Contact role	Code	30	The role of the library contact. The possible values are: ■ Other ■ ILS Acquisitions ■ ILS Cataloging ■ e-Product sponsor ■ Selector ■ Donor ■ e-Product ACQ contact ■ e-Product License contact ■ e-Product Access contact ■ Purchase Partner contact These fields can be customized by changing the value in the code table (select **Topic > Organization > Field > Contact Role**). The list contains library contact and organization contact roles. Note that the values of library contact roles begin with **INT** (meaning internal). Multiple roles can be entered, separated by a semicolon. If left blank or set to **<NULL>**, the system assigns a default role of **Other** for the new library contact. If the input file includes a new role for the updated library contact, the new library contact role is added to the list of already existing roles.	

Library Contact Loader Workflow

After Verde performs a general validation of the library contact input file, the workflow below is followed:

- When creating a new contact, the contacts are added without searching for a matching contact.
- When updating existing contacts, the contact being added is compared with contacts that exist in the database. If a match is found for the normalized contact name, library code, and e-mail, the contact record is updated. Otherwise, the contact record is added as a new contact.

When a new contact is created, a normalized version of the contact name is used for the matching field. The spaces are removed from the name and the letters are all changed to uppercase. The contact name cannot be edited with the loader.

Library IP Input Files

Verde's library IP loader loads the library IP input file. This input file contains a list of IP range records for an existing library that need to be added to, or removed from, the Verde database. The library IP loader cannot update records in the database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded. The library IP input file's columns are described in **Table 59**.

Since IP ranges are associated with a specific library, ensure that the library record exists in the Verde database before you load IP ranges for the library.

The library IP input file has the same rules as the library input file. For a description of these rules, see **Library Input File Rules** on page **315**.

Library IP Input File Fields

The following table describes the input file fields for the library IP loader.

Table 59. Library IP Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Library code	Text	30	The code of the library in Verde with which the IP range records are associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	Yes
From	Text	15	The start of the IP address range for the organization.	Yes
To	Text	15	The end of the IP address range for the organization.	
Exclude	Boolean	1	Indicates whether this IP is excluded from the range. If this field is left blank, the default **No** value is saved.	
Internal/Vendor	Boolean	1	Indicates whether the IP is internal or external. Values are **0** or **1**, where **0** is **Vendor** and **1** is **Internal**. If this field is left blank, the default value **Internal** is saved.	

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Organization and Organization Contact Input Files

This section includes:

- **About Organization Input Files** on page **327**
- **Organization Input File Rules** on page **327**
- **Organization Input File Fields** on page **329**
- **Organization Loader Workflow** on page **331**
- **Organization Contact Input Files** on page **331**
- **Organization Contact Input File Fields** on page **332**
- **Organization Contact Loader Workflow** on page **335**

About Organization Input Files

Verde's organization loader loads the organization input file. This input file loads organization records that need to be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The organization input file's columns are described in **Table 62**.

Organization Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain all mandatory columns, the input file is not loaded to Verde and an error is logged in the summary.

- All of the fields in the mandatory columns contain values. When an input line does not contain all of the mandatory fields, the input line is rejected and an error is logged in the output report.
- For new records, the following fields are mandatory:
  - **Organization code**
  - **Organization name**

  For example, the following sample input file creates two new organization records:

Table 60. Two New Organization Records

Organization Code	Organization Name
111	Organization 1
222	Organization 2

- For updated records, the **Organization code** is a mandatory field (identifies the organization to be updated).

  For example, the following sample input file updates two previously created organizations with alternate names:

Table 61. Updating Organizations with Alternate Names

Organization Code	Organization Name
111	First
222	Second

- The input file columns can be rearranged and columns can be removed from the input file. The text of the column's header cannot be modified.
- For new records, when a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.
- An organization code can include only the following characters: a-z, A-Z, 1-10, _ (underscore). If an organization code value in the input file includes other characters, the code will be converted by Verde. The original code will be saved as an external code. The converted code will be saved as an organization code.

Organization Input File Fields

The following table describes the input file fields for the organization loader.

Table 62. Organization Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Organization code	Text	30	The organization code. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	Yes
Organization Name	Text	100	An alternate name used for the organization. The organization can have up to three different alternate names.	Yes – For new records
Alternate name <number>	Text	100	An alternate name used for the organization.	
Active	Boolean	1	Indicates whether an organization is active or inactive. The possible values are **0** or **1**, where: ■ 1= Active ■ 0= Inactive If this field is left blank, the **Active** default value is saved for the new organization.	
Street	Text	100	The street name in the organization's address.	
City	Text	50	The city in which the organization is located.	
State/Province	Text	50	The state or province in which the organization is located.	
Country	Text	50	The country in which the organization is located.	

Table 62. Organization Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Postal code	Text	15	The zip code in the organization's address.	
Organization role	Code	30	The role of the organization. The possible values are: ■ Consortial member ■ Consortium ■ Interface provider ■ Licensing agent ■ Licensor ■ Vendor These fields can be customized in the code table. Multiple roles can be entered, separated by a semicolon. If this field is left blank or set to **<NULL>**, the system assigns a default role of **Vendor** for the new organization. If the input file includes a new role for the updated organization, a new organization role will be added to the list of already existing roles.	
Role note	Text	255	Organization role notes	

Organization Loader Workflow

After Verde verifies that the organization input file is in the correct format and that each of the rows contains the mandatory information, Verde searches for a record in the database that matches the **Organization code** field. If the organization is found, Verde updates the organization record. If no organization record is found, Verde creates a new organization record, provided the input file contains all the information needed for creating a new organization.

When an organization code is added or updated more than once in an input file, the values specified in the last update are saved in the database.

Organization Contact Input Files

Verde's organization contact loader loads the organization contact input file. This input file contains a list of organization contact records for an existing organization that need to be added to, or updated in, the Verde database.

The input file contains columns for the fields in the Verde database and rows for each record being loaded.

Since organization contacts are associated with a specific organization, ensure that the organization record exists in the Verde database before you load organization contacts for the organization. The organization contact input file's columns are described in **Table 63**. The organization contact input file follows the same rules as the organization input file. For a description of these rules, see **Organization Input File Rules** on page **327**.

Organization Contact Input File Fields

The following table describes the input file fields for the organization contact loader.

Table 63. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Organization code	Text	30	The Verde code of the organization with which the organization contact record is associated. If this field is blank, the record will be rejected and an error will appear in the loader's log file.	Yes
Contact name	Text	30	The organization contact's name.	Yes
Job title	Text	30	The organization contact's job title.	
Email	Text	30	The organization contact's e-mail address.	Yes
Phone No.	Text	30	The organization contact's phone number.	
Alternate phone No.	Text	30	The organization contact's secondary phone number.	
Fax No.	Text	30	The organization contact's fax number.	
Street	Text	100	The name of the street in the organization contact's address.	
City	Text	50	The city in the organization contact's address.	
State/Province	Text	50	The province in the organization contact's address.	

Table 63. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Country	Text	50	The country in the organization contact's address.	
Postal code	Text	15	The zip code in the organization contact's address.	
Main contact	Boolean	1	The organization's main contact. There are two possible values: **1 (Yes)** or **0 (No)**. If this field is left blank, the default value, **0**, is saved. Note that only one contact per organization can be defined as the main contact.	

Table 63. Organization Contact Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Contact role	Code	30	The role of the organization contact. The possible values are: ■ Other ■ Technical support ■ Account manager ■ Sales representative ■ License contact ■ Trial contact ■ Consortial contact These fields can be customized in the code table. Multiple roles can be entered, separated by a semicolon. If this field is left blank or set to **<NULL>**, the system assigns a default role of **Other** for the new organization contact. If the input file includes a new role for the updated organization contact, the new contact role is added to the list of already existing roles.	
Contact role note	Text	255	Additional information about the organization contact role.	

Organization Contact Loader Workflow

After Verde performs a general validation of the organization contact input file, the workflow below is followed:

- When creating a new contact, the contact will be added without searching for a matching contact.
- When updating existing contacts, the contact being added is compared with contacts existing in the database. If a match is found on the normalized contact name, organization code, and e-mail, the contact record is updated. Otherwise, the contact record is added as a new contact.

When a new contact is created, a normalized version of the contact name is used for the matching field. The spaces are removed from the name and the letters are all changed to uppercase. The contact name cannot be edited with the loader.

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Admin and Local Admin Input Files

This section includes:

- **About Admin Input Files** on page **337**
- **Admin Input File Rules** on page **337**
- **Admin Input File Fields** on page **338**
- **Admin Loader Workflow** on page **344**
- **About Local Admin Input Files** on page **345**
- **Local Admin Input File Rules** on page **345**
- **Local Admin Input File Fields** on page **346**
- **Local Admin Loader Workflow** on page **347**

About Admin Input Files

Verde's admin loader loads the admin input file. This input file loads admin records that must be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The admin input file's columns are described in **Table 65**.

Admin Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes the mandatory **Match** column. When an input file does not contain the mandatory column, it is not loaded to Verde and an error is logged in the summary.
- The **Match** column contains values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.

- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field or a default value is supplied. There are two fields in the admin record that have default values:

Table 64. Admin Record Fields with Default Values

Fields	Default Value
Statistics standard compliance	Counter
Usage statistics frequency	Annual

Admin Input File Fields

The following table describes the input file fields for the admin loader.

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Match			Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	Yes

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Online admin module available	Boolean	1	Denotes whether resource attributes can be directly modified online by the subscribing institution.	
Admin URI	Text	500	The URI of the online administration module. You can insert the value only if the **Online admin module available** value is positive (defined as **1**, **Yes** or **True**).	
Session timeout	Boolean	1	Indicates whether there is a configurable inactivity timeout.	
Session timeout value	Integer	3	The inactivity timeout used for the resource. You can insert the value only if the **Session timeout** value is positive (defined as **1**, **Yes** or **True**).	
Logout URI	Boolean	1	Indicates whether a logout URI can be specified.	
Logout URI value	Text	500	The logout URI used with the resource. You can insert the value only if the **Logout URI** value is positive (defined as **1**, **Yes** or **True**).	
User e-Interface configuration	Boolean	1	Indicates the ability to control user interface features.	
Subscriber branding available	Boolean	1	Indicates whether a branding feature is available.	
Subscriber branding activated	Boolean	1	Indicates whether branding has been activated.	

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Subscriber branding note	Text	500	Subscriber branding note.	
Personalization services available	Boolean	1	Indicates whether alerting and other personalization features are available.	
Z39.50 supported	Boolean	1	Indicates the ability of the resource's interface to support z39.50.	
Hook to holdings	Boolean	1	Indicates the availability of a link to library holdings.	
Holdings activated	Boolean	1	The activation of a link to library holdings.	
Provider reference linking available	Boolean	1	The availability of links to external content created by the provider of the resource.	
Inbound linking indicator	Boolean	1	The availability of a link to internal, stable locations within a product.	
Inbound linking activation status	Boolean	1	Indicates the activation of a link to internal, stable locations within a product.	
OpenURL compliant	Boolean	1	The ability for the electronic product and its content to be Open URL compliant.	
OpenURL activation status	Boolean	1	The activation of external links.	
Linking note	Text	500	Information about external linking—for example, implementation details or other notes.	

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
MARC record availability	Boolean	1	The availability of MARC records for the resource.	
MARC record note	Text	500	Further information regarding the availability of MARC record sets—for example, free or purchased, acquisition and implementation status, and so forth	
Interface languages availability	Boolean	1	The availability of multiple languages for the interface.	
Interface languages implemented	Text	9	The activation of one or more interface languages. Multiple languages (up to three) can be entered, separated by a semicolon. The size of each language value is limited to three characters.	
Usage statistics available	Boolean	1	The availability of usage statistics for the resource.	
Statistics standard compliance	Code	100	The official standard to which the statistics conform. The possible values are: ■ Counter ■ ICOLC 1998 These fields can be customized in the code table.	
Usage statistics delivery method	Text	250	The manner in which statistics are made available.	

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Usage statistics format	Text	35	The formats in which statistics are made available. Multiple formats can be entered, separated by a semicolon. The possible values are: ■ HTML ■ Delimited ■ Excel ■ PDF ■ CSV ■ ASCII ■ Other	
Usage statistics frequency	Code	20	The frequency with which statistics are made available. The possible values are: ■ Annual ■ Bi-annual ■ Monthly ■ Quarterly ■ User-selectable These fields can be customized in the code table.	
Usage statistics online location	Text	500	The online location at which statistics can be accessed, such as a URL or file path.	
Usage statistics delivery addressee	Text	30	Library contact name.	

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Usage statistics note	Text	500	Additional information regarding usage statistics.	
Usage statistics locally stored	Text	500	Information about and/or links to locally stored data.	
Hardware requirements - internal	Text	500	Internal information about hardware requirements and restrictions.	
Hardware requirements - public	Text	500	Public information about hardware requirements and restrictions.	
Software requirements - internal	Text	500	Internal information about software requirements.	
Software requirements - public	Text	500	Public information about software requirements.	
Maintenance window value	Text	250	The provider's regularly scheduled downtime window for this product. The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable.	
Provider system status URI	Text	500	The URI at which the provider posts system status information.	
Provider system status URI type	Code	10	The URI type used to post system status information. The possible values are URN and URL.	

Table 65. Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Local performance monitoring note	Text	500	Information concerning Web sites or programs that carry out local performance monitoring.	
Incident log	Text	500	A log of downtime and problem reports, as well as their resolution.	
Training information	Text	500	Information regarding the availability of special training—for example, instructions on how to bypass simultaneous user restrictions. May also include training contact names and other general information.	
Administrative documentation	Text	500	Information about, and/or location of, documentation available for product administrators.	
User documentation	Text	500	Information about, and/or location of, documentation available for end users.	

Admin Loader Workflow

After Verde verifies that the admin input file is in the correct format and includes the mandatory **Match** column, Verde examines the **Match** field:

- If no match is found for this field, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde checks the validity of the other fields in the input file. If the fields are in the correct format, an admin record is created. Otherwise, the line is rejected.

About Local Admin Input Files

Verde's local admin loader loads the local admin input file. This input file loads the local admin records that need to be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The local admin input file's columns are described in **Table 66**.

Local Admin Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- The following fields are mandatory:
  - **Match**
  - **Library**
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.

Local Admin Input File Fields

The following table describes the input file fields for the local admin loader.

Table 66. Local Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Match	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	Yes
Library	Text	255	Library name or library code	Yes
Local Admin user name	Text	255	Local admin user name	
Local Admin password	Text	255	Local admin password	
Local Admin password note	Text	255	Local admin password note	
Usage statistics user name	Text	255	The identifier used for online access to the usage statistics file.	
Usage statistics password	Text	255	The password used for online access to the usage statistics management site or dataset.	

Table 66. Local Admin Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Usage statistics password note	Text	255	Additional information regarding usage statistics.	

Local Admin Loader Workflow

After Verde verifies that the local admin input file is in the correct format and includes mandatory columns, it examines the **Match** field:

- If no match is found for this field, the line is rejected.
- If Verde retrieves more than one e-product, the line is rejected.
- Otherwise, Verde checks whether an admin record exists for the e-product:
  - If an admin record is not found, the line is rejected.
  - If an admin record is found, Verde checks the **Library** field value in the input file:
    - If a match is not found, the line is rejected.
    - If a match is found, Verde creates the local admin record.

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Access and Access Authorization Input Files

This section includes:

- **About Access Input Files** on page **349**
- **Access Input File Rules** on page **350**
- **Access Input File Fields** on page **352**
- **Access Loader Workflow** on page **356**
- **About Access Authorization Input Files** on page **357**
- **Access Authorization Input File Rules** on page **357**
- **Access Authorization Input File Fields** on page **358**
- **Access Authorization Loader Workflow** on page **361**

About Access Input Files

Verde's access loader loads the access input file. This input file loads access records that must be added to, or updated in, the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded. The access input file's columns are described in **Table 69**.

Access Input File Rules

Before loading your input file, ensure that the file follows these rules:

- The input file includes the mandatory **Match** and **Access Type** columns. When an input file does not contain the mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- There are four possible access types in Verde: **WWW** (Web interface), **Z39.50**, **XML**, and **SRW/SRU**. It is possible to attach up to four access records with different access types to a single e-product.
- If you want to load access records with different access types, it is recommended that you use the **AccessLoaderFullListTemplate** template that includes a full list of fields. Some of the fields are common to all access types. Other fields are relevant only for specific access types.
- If you want to load access records for a specific access type, use one of the following templates (each template available for a specific access type):
  - **AccessLoaderWWWTypesTemplate**
  - **AccessLoaderXMLTypesTemplate**
  - **AccessLoaderZ39TypesTemplate**
  - **AccessLoaderSRW_SRUTypesTemplate**

  The templates are saved on the server in the `examples_and_templates` directory. For more information, see **Loading Input Files to Verde** on page **236**.
- Input values that are not relevant for the defined access type are ignored.
- Some fields are mandatory for several access types. For a full list of mandatory fields for each access type, see the following table:

Table 67. Access Types – Mandatory Columns

Access Type	Mandatory Columns
WWW	None
Z39	Z39.50 address, z39.50 port
XML	XML port
SRW/SRU	SRW/SRU, base URL

- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field or a default value is supplied. The following fields in the access record have default values:

Table 68. Access Record – Default Values

Access Type	Field	Default Value
All	Access Status	Active
All	Implemented authorization method	Null
All	Alternate authorization method	Null
All	IP address registration method	Online
WWW	Primary access URI type	URL
WWW	Alternate access URI type	URL
WWW	Local Persistent URI type	URL
SRW/SRU	SRW/SRU port	0

- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- For records being updated, the existing values are left unchanged, including blank fields. You can clear the value of a non-mandatory field by entering `<NULL>` in the appropriate column in the input file. If a mandatory field's value is cleared, the record is not loaded and an error is returned.

Access Input File Fields

The following table describes the input file fields for the access loader.

Table 69. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Match (mandatory field)	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	All
Access type (mandatory field)	Text	255	The possible values are: ■ WWW ■ Z39 ■ XML ■ SRW/SRU	All
Access status (mandatory field)	Code	30	The possible values are: ■ Active ■ Inactive ■ Test These fields can be customized in the code table.	All
Domain names	Text	250	Domain names	All

Table 69. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Implemented authorization method	Code	30	The possible values are: ■ Empty ■ Certificate ■ IP address ■ IP address + password ■ Other ■ Password ■ Script ■ Unrestricted These fields can be customized in the code table.	All
Alternate authorization method	Code	30	The possible values are: ■ Empty ■ Certificate ■ IP address ■ IP address + password ■ Other ■ Password ■ Script ■ Unrestricted These fields can be customized in the code table.	All
Authorization method note	Text	500	Authorization method note	All
IP address registration method	Code	30	The possible values are: ■ Online ■ Send to provider These fields can be customized in the code table.	All

Table 69. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
IP address registration instructions	Text	500	IP address registration instructions	All
IP address general note	Text	500	IP address general note	All
Access information note	Text	500	Access information note	All
Primary access URI	Text	500	Primary access URI	WWW
Primary access URI type	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined These fields can be customized in the code table.	WWW
Alternate URI	Text	500	Alternate URI	WWW
Alternate access URI type	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined These fields can be customized in the code table.	WWW
Local persistent URI	Text	500	Local persistent URI	WWW
Local persistent URI type	Code	30	The possible values are: ■ URL ■ URI ■ Undetermined These fields can be customized in the code table.	WWW

Table 69. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
Persistent name	Text	50	Persistent name	WWW
Z39.50 address (mandatory field – for Z39 access type)	Text	250	Z39.50 address	Z39
Z39.50 port (mandatory field – for Z39 access type)	Integer	19	Z39.50 port	Z39
Z39.50 version supported	Text	50	Z39.50 version supported	Z39
Z39.50 use attributes	Text	500	Z39.50 use attributes	Z39
Z39.50 information from vendor	Text	500	Z39.50 information from vendor	Z39
Z39.50 database name - long	Text	100	Z39.50 database name - long	Z39
Z39.50 database name - short	Text	50	Z39.50 database name - short	Z39
Z39.50 note	Text	500	Z39.50 note	Z39
XML Base URL	Text	500	XML Base URL	XML
XML port (mandatory field – for XML access type)	Integer	19	XML port	XML
Link to DTD	Text	500	Link to DTD	XML, SRW/ SRU
DTD note	Text	500	DTD note	XML, SRW/ SRU

Table 69. Access Input File Fields

Field Name	Type of Field	Field Length	Description	Related Access Type
URL to XML information from vendor	Text	500	URL to XML information from vendor	XML, SRW
XML gateway note	Text	500	XML gateway note	XML
SRW/SRU (mandatory field – for SRW/ SRU access type)	Text	10	Possible values are: ■ SRW ■ SRU	SRW/ SRU
SRW Base URL (mandatory field – for SRW/ SRU access type)	Text	500	SRW Base URL	SRW/ SRU
SRW/SRU port	Integer	19	SRW/SRU port	SRW/ SRU
SRW/SRU version supported	Text	500	SRW/SRU version supported	SRW/ SRU
SRW/SRU attributes	Text	500	SRW/SRU attributes	SRW/ SRU
SRW/SRU note	Text	500	SRW/SRU note	SRW/ SRU

Access Loader Workflow

After Verde checks whether the access input file is in the correct format and includes the mandatory **Match** and **Access Type** columns, Verde examines the **Match** field value:

- If no match is found for this field value, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde examines the **Access type** field value:
  - If an access record with the defined access type exists for the e-product, Verde updates the access record.

- Otherwise, Verde checks the values of the mandatory fields for the defined access type.
  - If values do not exist, the line is rejected.
  - If values do exist, Verde verifies the validity of the other fields in the input file. If the fields are in the correct format, an access record is created. If the fields are not in the correct format, the line is rejected.

About Access Authorization Input Files

Verde's access authorization loader loads the access authorization input file. This input file loads the access authorization records that need to be added to the Verde database. The input file contains columns for the fields in the Verde database and rows for each record being loaded.

Note: The access authorization loader only creates access authorization records and does not update these records. Each time you load new access authorization records, the previous ones are deleted. Thus, if you want to update one or two fields in an existing access authorization record, it is recommended that you do so manually, in the KB Manager module.

The access authorization input file columns are described in **Table 70**.

Access Authorization Input File Rules

Before loading your input file, ensure that your input file follows these rules:

- The input file includes mandatory columns. When an input file does not contain mandatory columns, it is not loaded to Verde and an error is logged in the summary.
- The mandatory columns contain values. When an input line does not contain a value for a mandatory field, the input line is rejected and an error is logged in the output report.
- The following columns are mandatory:
  - **Match**
  - **Access Type**
  - **Library**
- An access authorization record lists the valid libraries for the instance, including related access authorization data for these libraries. A library that

is included in an input line is treated as active by the related access authorization record. All other libraries that are not listed in the input line but exist in the instance, are saved as inactive in the newly created access authorization record.

For example, if there are 10 libraries in an instance in which a loading occurs, two libraries (1 and 2) are included in the access authorization input file's **Library** field for e-product X and access type Y. In the access authorization record created via loading for e-product X and access type Y, libraries 1 and 2 will be active and the other libraries (3-10) will be inactive.

- If each library has its own access authorization record, you must create a separate input line for each library. In this case, the input file will contain lines with the same **Match** and **Access type** values, but different **Library** values.
- The input file columns can be rearranged and non-mandatory columns can be removed from the input file. The text of the column's header cannot be modified.
- When a field is left blank, or a column is removed from the input file, the field is saved in the database as an empty field.

Access Authorization Input File Fields

The following table describes the input file fields for the access authorization loader.

Table 70. Access Authorization Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Match	Text	30	Must be one of the following: ■ Verde e-product code ■ SFX ID of associated e-product **Note:** If you choose to use an SFX ID as the unique identifier for each record and you want to edit the file in Excel, format the ID column as text. If the ID column is in general or number format, Excel does not store any digits past the 15th digit and the data is lost.	Yes
Access type	Text	30	The possible values are: ■ WWW ■ Z39 ■ XML ■ SRW/SRU	Yes
Library	Text	255	Library name or library code.	Yes
Proxy server decision	Boolean	1	Proxy server decision	

Table 70. Access Authorization Input File Fields

Field Name	Type of Field	Field Length	Description	Mandatory Fields
Proxy registration status	Code	10	The possible values are: ■ Not applicable ■ To be registered ■ Registration in process ■ Registered These fields can be customized in the code table. The default value is **Not applicable**.	
Proxy note	Text	250	Proxy Note	
Electronic resource user identifier	Text	100	Electronic resource user identifier	
Electronic resource user password	Text	100	Electronic resource user password	
Electronic resource local user identifier	Text	100	Electronic resource local user identifier	
Electronic resource user password note	Text	250	Electronic resource user password note	

Access Authorization Loader Workflow

After Verde verifies that the access authorization input file is in the correct format and includes mandatory columns, Verde examines the **Match** field value:

- If no match is found for this field value, the line is rejected.
- If Verde retrieves matches for more than one e-product, the line is rejected.
- If only one related e-product is found, Verde examines the **Access type** field value:
  - If an access record with the defined access type does not exist for the e-product, the line is rejected,
  - If an access record with the defined access type does exist for the e-product, Verde proceeds to search for a record in the database that matches the value in the **Library** field:
    - If no match is found, the line is rejected.
    - If a double match is found, the line is rejected.
    - If only one match is found, Verde removes the existing access authorization record and creates a new one.

33

View Loader Output

This section includes:

- **Viewing Loader Output** on page **363**
- **Viewing the Report Summary** on page **365**
- **Viewing the Report File** on page **366**

Viewing Loader Output

When you load an input file, an output file containing report summary information is created. The format and general delivery settings of the report are defined when setting the input file load settings (see **Loading Input Files to Verde** on page **236**).

The View Loader Output options and functionality are similar to those of the View Report Output, as described in **View Report Output** on page **197**.

To view the loader output:

1 From the **Select a tool** drop-down list, select **View Loader Output**.

2 Select the loader from the list of loaders.

3 In the **Loader** menu, select the report you want to view.

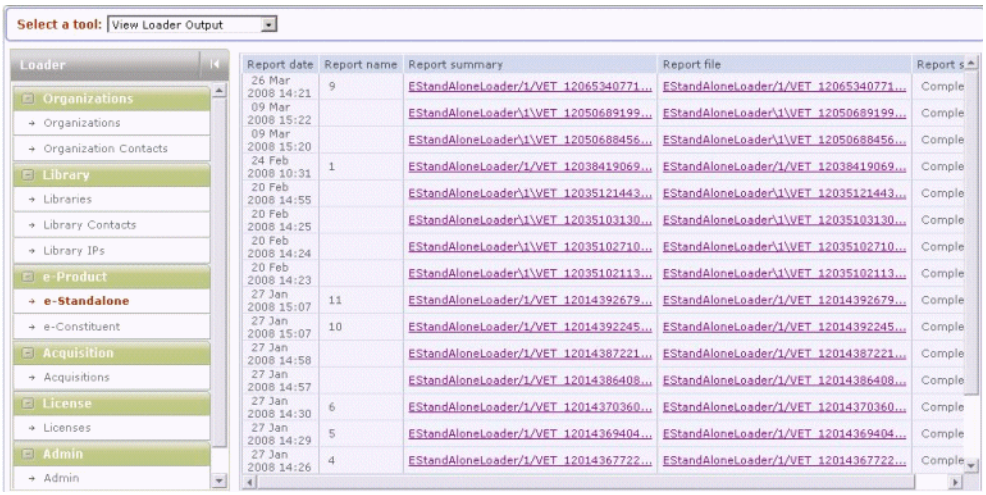


Figure 112: Loader Output Report

The following information is displayed for each loader output:

- **Report date** – The date on which the report was created.
- **Report name** – The name given to the report. This is specified while defining the load output settings during the run.
- **Report summary** – A link to the text file containing the load's report summary. Click the link to view the load's report summary. For a description of the report summary, see **Viewing the Report Summary** on page **365**.
- **Report file** – A link to the XML, CSV, or PRN file containing the load's report file. Click the link to view the load's report file. For a description of the report file, see **Viewing the Report File** on page **366**.
- **Report status** – The status of the report. The following statuses are possible: **In Process**, **Complete**, **Failed**.

Viewing the Report Summary

The report summary contains a summary of the load process, including a list of the records that were updated or added and the input file statistics.

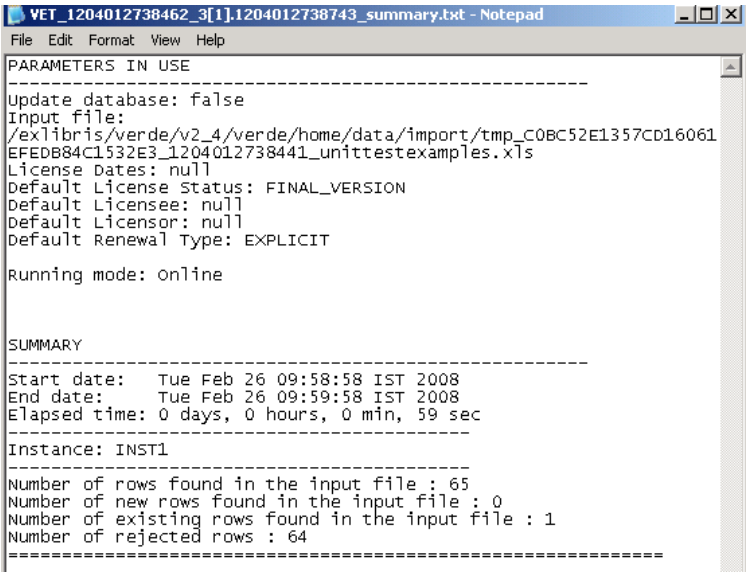

VET_1204012738462_3[1].1204012738743_summary.txt - Notepad
File Edit Format View Help
PARAMETERS IN USE
Update database: false
Input file:
/exlibris/verde/v2_4/verde/home/data/import/tmp_C0BC52E1357CD16061EFEDB84C1532E3_1204012738441_unittestexamples.xls
License Dates: null
Default License Status: FINAL_VERSION
Default Licensee: null
Default Licensor: null
Default Renewal Type: EXPLICIT
Running mode: Online
SUMMARY
Start date: Tue Feb 26 09:58:58 IST 2008
End date: Tue Feb 26 09:59:58 IST 2008
Elapsed time: 0 days, 0 hours, 0 min, 59 sec
Instance: INST1
Number of rows found in the input file : 65
Number of new rows found in the input file : 0
Number of existing rows found in the input file : 1
Number of rejected rows : 64

Figure 113: Load Report Summary

The **Parameters in Use** section of the load report summary lists the information entered in the loaders screen.

The following table describes the **Summary** section of the load report summary:

Table 71. Load Report Summary

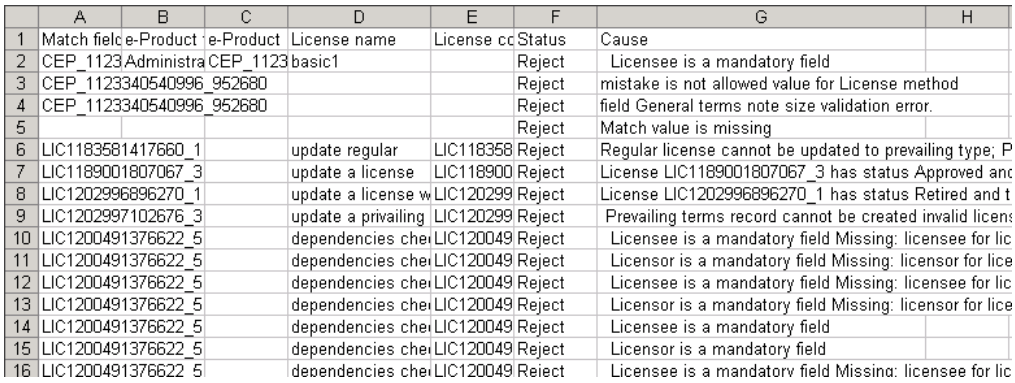
Field	Description
Start date	The date and time the run started.
End date	The date and time the run completed.
Elapsed time	The total number of days, hours, minutes, and seconds it took to complete the run.
Instance	The instance code of the Verde instance to which the records were loaded.
Reading File	The location of the input file and file name.
Total number of records in input file	The number of e-constituent/ acquisition/ license/ admin/ library/organization records in the input file.
Number of new records in input file	The number of new e-constituent/ acquisition/ license/ admin/library/organization records in the input file.

Table 71. Load Report Summary

Field	Description
Number of existing records	The number of existing e-constituent/ acquisition/ license/ admin/library/organization records that updated successfully.
Number of rejected records	The number of e-constituent/ acquisition/ license/ admin/ library/organization records that were rejected.

Viewing the Report File

The report file contains summary details regarding each of the input file's records.



	A	B	C	D	E	F	G	H
1	Match fielc	e-Product	e-Product	License name	License cc	Status	Cause	
2	CEP_1123	Administra	CEP_1123	basic1		Reject	Licensee is a mandatory field	
3	CEP_1123340540996_952680					Reject	mistake is not allowed value for License method	
4	CEP_1123340540996_952680					Reject	field General terms note size validation error.	
5						Reject	Match value is missing	
6	LIC1183581417660_1			update regular	LIC118358	Reject	Regular license cannot be updated to prevailing type; P	
7	LIC1189001807067_3			update a license	LIC118900	Reject	License LIC1189001807067_3 has status Approved and	
8	LIC1202996896270_1			update a license w	LIC120299	Reject	License LIC1202996896270_1 has status Retired and t	
9	LIC1202997102676_3			update a privailing	LIC120299	Reject	Prevailing terms record cannot be created invalid licens	
10	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	
11	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensor is a mandatory field Missing: licensor for lice	
12	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	
13	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensor is a mandatory field Missing: licensor for lice	
14	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensee is a mandatory field	
15	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensor is a mandatory field	
16	LIC1200491376622_5			dependencies chei	LIC120049	Reject	Licensee is a mandatory field Missing: licensee for lic	

Figure 114: Report File

The report provides the following information for all loader types, per record:

- Match field – Match value in the input file.
- Status – Possible values are:
  - New, Updated, Rejected – for e-constituent/e-standalone/license/access loaders
  - New, Rejected – for admin/access authorization loaders
  - Failure, Success – for organization/library/acquisition/ALEPH Vendor Converter loaders
- Cause – If the record was rejected, the reason for the rejection.

In addition to the information that is provided for all loader types and described above, the following loaders can have additional columns that provide specific information:

- e-Constituent loader
  - e-Product Title – the e-product title of a new or updated e-constituent/e-standalone
  - e-Package Title
- License loader:
  - e-Product Title – the e-product title of an e-product associated with a new license.
  - e-Product Code – the e-product code of an e-product associated with a new license.
  - License Name – the license name of a new or updated license.
  - License Code – the license code of a new or updated license.
- Acquisition loader:
  - Sequence – the number of lines in the acquisition input file
  - Match Field – the match type in the acquisition input file (e-product code, SFX ID, or title).
  - e-Product Code
  - Acquisition Number

34

View KB Reports and View Scheduled Tasks

This section includes:

- **Viewing KB Reports** on page **369**
- **Viewing Scheduled Tasks** on page **370**

Viewing KB Reports

The Verde task **Update the Local KnowledgeBase** (activated from the Admin module), produces a number of reports that can be viewed in the KB Tools module.

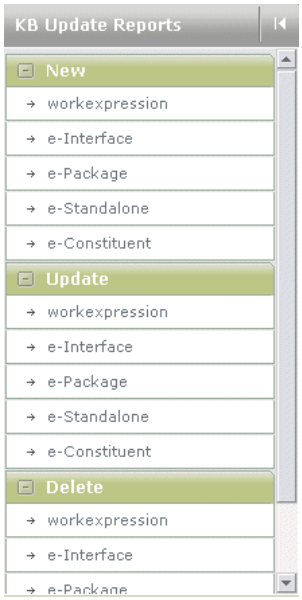


Figure 115: Viewing KB Manager Reports

Fifteen reports can be generated per instance, per update:

- New, Update and Delete
- Work expression
- e-Interface
- e-Package
- e-Standalone
- e-Constituent

For more information about the KnowledgeBase update process, refer to the *KnowledgeBase Update Process and Instructions Guide*.

Viewing Scheduled Tasks

Verde report and task options allow you to either run a report or task online, or to schedule it for a later time.

The **View Scheduled Tasks** list provides details of all the jobs that have been scheduled.

Figure 116: View Scheduled Tasks List

The summary display of jobs shows:

- the name of the job
- the process
- the date on which the job next runs
- the job creator
- the instance
- the reoccurrence pattern (for example, daily, weekly, monthly)
- the actions that can be performed (edit or delete)

The Job Scheduler can be searched and filtered by the person who initiated the task (creator).

35

Customized Report Outputs

This section includes:

- **About Customizing Report Outputs** on page **371**
- **Creating Your Own Properties File** on page **372**
- **Editing the Properties File** on page **372**
- **Choosing a Properties File** on page **375**

About Customizing Report Outputs

All Verde report outputs can be customized by the instance. In the Delivery Properties screen, you have the option of choosing a defined report output.

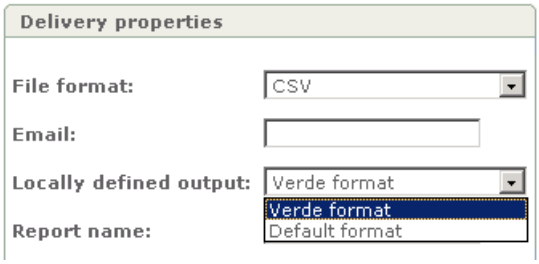


Figure 117: Customized Report Outputs

By default, the **Locally defined output** drop-down list contains two options: **Verde format** and **Default format**. The Verde format is a fixed format and cannot be customized by users. The default format is editable for, and accessible to, users.

When creating a customized output, you can configure the following:

- the fields included in the report output and the order in which these fields appear
- the column names
- the header for the report

Creating Your Own Properties File

Customization is accomplished through a properties file. All properties files are on the server in the following directory:

`/exlibris/verde/$VERDE_BASE/home/profile/reportsCustomization`

There is a subdirectory for each instance. For example:

`/exlibris/verde/home/data/reportsCustomization/INST1`

For each report, task, and loader, there is a default file that matches the report name. For example:

- `EProductGeneralReportOutputFormat.properties` for the e-product general report.
- `EProductsUpdateLoaderOutputFormat.properties` for the e-product update loader report.
- `LicenseRenewalTaskOutputFormat.properties` for the license renewal report.

To create your own customized properties file, copy the default file and add `_name` to it. For example:

- `EProductGeneralReportOutputFormat_mylibrary.properties`
- `LicenseRenewalTaskOutputFormat_myinstance.properties`

Editing the Properties File

The properties file contains three sections: a section that controls the fields included in the output, a section that controls the column names, and a section that controls the header parameters.

Fields

The first section of the file contains a list of all the fields that are included in the output and a number that controls the sequence in which the fields occur.

For example, in the `EProductGeneralReportOutputFormat.properties` file, the output fields are:

```
1=eproductType
2=eproductTitle
3=eproductIdentifier
4=eproductCode
5=workExpressionCode
6=(eproduct)instanceCode
7=sourceInstanceCode
8=SFXID
9=metaLibID
10=otherID
11=otherSource
...
```

In the `LicenseRenewalTaskOutputFormat.properties` file, the license renewal output fields are:

```
1=licenseCode
2=licenseName
3=licensee
4=licensor
5=renewalTypeCode
6=localLicenseNegotiator
7=endDate
8=eproductTitle
9=eproductIdentifier
```

To remove a field, comment it out by inserting a hash (#) sign at the beginning of the line. For example:

- `#3=eproductIdentifier`
- `#7=endDate`

To change the order of the fields, change the sequence number. For example:

- `1=eproductIdentifier` means that this field would appear first
- `4=eproductIdentifier` means that this field would appear fourth

Note: The default file contains a list of all possible fields. You can remove and change the order of fields, but you cannot add fields.

Column Names

In this section called **Keys Headers** in the properties file, the names of columns are assigned.

Note the following:

- The number of columns should match the number of fields.
- The first word is the field name as it appears in section 1. The second phrase is the column name that appears in the report. For example:
  - `eproductType=e-product type`
  - `localLicenseNegotiator=Local license negotiator`

If a field does not appear, the system uses the Verde default field name.

Header Parameters

In this section, you configure the contents and order of the report header.

Note that spaces and a return (line break) can be added between fields.

The report header appears as the first line in the CSV and PRN files and as the first section in the XML output.

If this section does not exist, the default header file (`defaultHeaderFormat.properties`) is used. If this default header file does not exist, there is no header in the report.

When defining the header options, note that the number linked to each element defines its order in the header. In the example below, the report name appears before the library name:

```
1_header_reportName=running report name
2_header_spaces=4
3_header_libraryName=yes
```

The following can be included in the header:

- **Report name** – the name you assign to the report, for example:

  `1_header_reportName= My Library's report`

  Note that the number (in this example, 1) is the order in which the parameter appears in the report.

  The **value Running report name** uses the system name for the report. This name cannot be changed, but it can be replaced by any other value that appears in the report instead of the report name—for example, `1_header_reportName=My Library's report`.

- **Library name** – The name of the instance in which the report was run—for example:

  `n_header_libraryName=yes`

  Values can be **yes** or **no**.

- **Staff user name** – For example:

  `n_header_staffName='yes'`

  This includes the name of the staff user that ran the report.

- **Date** – for example:

  `n_header_dateFormat`=(string)format of execution date

  dd/mm/yyyy 'at' HH:mm:ss translates to:

  `20/07/2005 at 12:08:56`

  EEE, d MMM yyyy HH:mm:ss translates to:

  `Wed, 20 Jul 2005 12:08:56`

- **n_header_spaces=(number)** – This defines the number of spaces between elements of the header.

- **n_header_return=(number)** – This defines the number of returns—that is, line breaks.

  The following is an example of the header section for the **Subscriptions for Review Report**:

```
1_header_reportName=running report name
2_header_spaces=4
3_header_libraryName=yes
4_header_spaces=4
5_header_dateFormat=dd/mm/yyyy 'at' HH:mm:ss
```

  This produces the following header:

```
Subscriptions for Review Report  Ex Libris University  20/12/
2005 at 12:40:22
```

Choosing a Properties File

In the drop-down list, the system automatically provides a list of all the properties files that exist for the report/task being run.

After modifying the properties files, use the JMX console to refresh the drop-down list. Alternatively, you can restart Verde to refresh this list.

When a new instance is created using the **Duplicate** function, the properties directory is created.

If, for some reason, the instance is created a different way, use the **ReportsCustomizationMngr** JMX console service to copy the directory for a new instance. Enter the new instance name in the window provided.

To refresh the drop-down list using the JMX console:

1. Reduce the URL address of your Verde environment in your Web browser so that the address includes only the following: **http://<server name>:<port number>/**. Go to this URL. The JBoss page opens.
2. Under **JBoss Management**, click **JMX Console**. In the login prompt, enter your instance administrator user name and password.

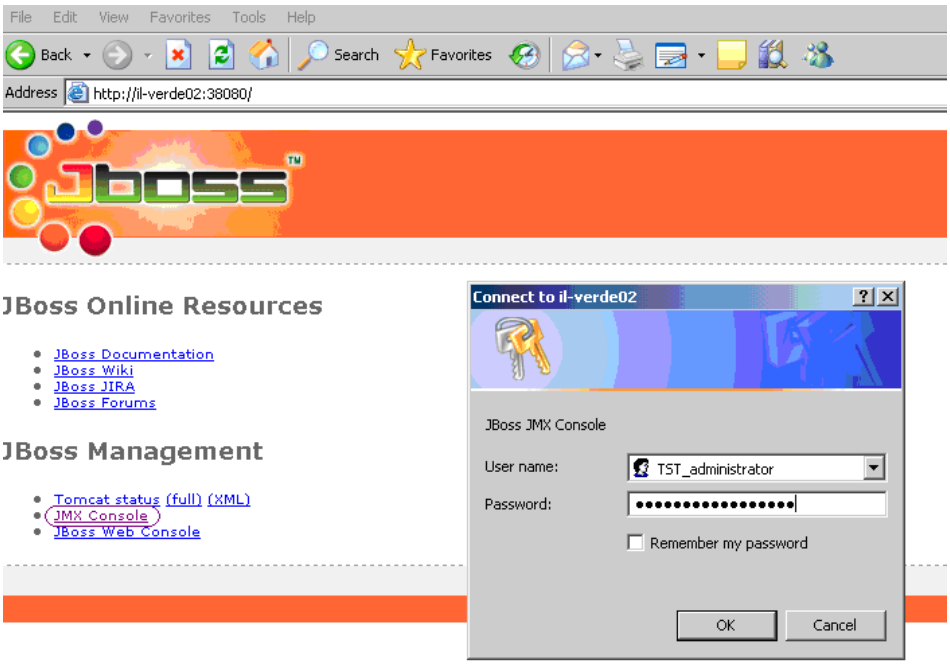


Figure 118: JBoss JMX Console Login

The JMX Agent View page opens.

3 Locate the **Verde** section at the end of the page and click the **Report Customization Manager Service** link in this section.

Figure 119: JMX Agent View – Verde Section

The JMX MBean View page opens.

4 Locate the **refreshCache** section and click **Invoke**. The JMX MBean Operation Result page opens with the result of the operation..

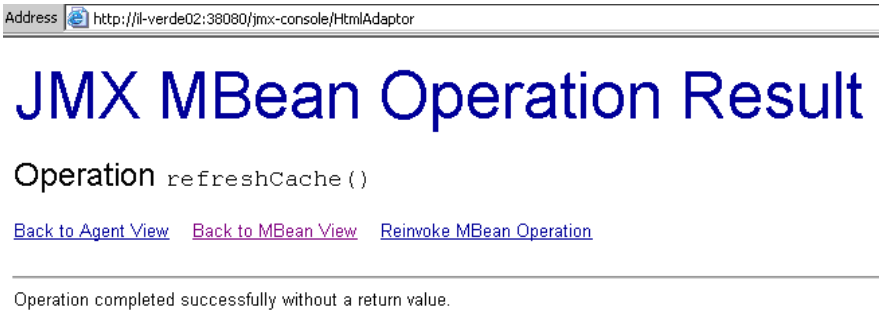


Figure 120: JMX MBean View – Refresh Cache

5 Log in once again to your Verde environment. The name of your own properties file is now displayed in the drop-down list.

Part 4

Verde Tasks Module

Part 4 contains the following:

- Section **36: Verde Tasks** on page **381**

36

Verde Tasks

Verde Tasks is the area where staff members can view various tasks waiting for some action or input. These tasks are usually a result of workflows that have been initiated in the system.

After clicking the **Verde Tasks** tab, the user is defaulted to the **Task** tab with a list of tasks related to the user's role.

The options for filtering tasks are:

- My open tasks
- My closed tasks
- My tasks
- Unassigned tasks
- My tasks and unassigned tasks

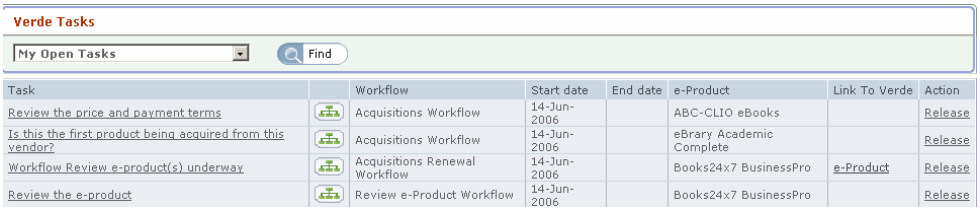


Figure 121: Verde Tasks

The task summary screen displays the following information:

- The name of the task. Clicking the name opens the task.
- Workflow Icon. Click the workflow icon to display the workflow diagram
- The workflow to which the task is linked.
- Start date
- End date
- The name of the e-product

- A link to the relevant e-product
- Action

A user with administrator password privileges is able to access the additional **Verde Tasks/Admin** tab. This tab displays all tasks for all users.

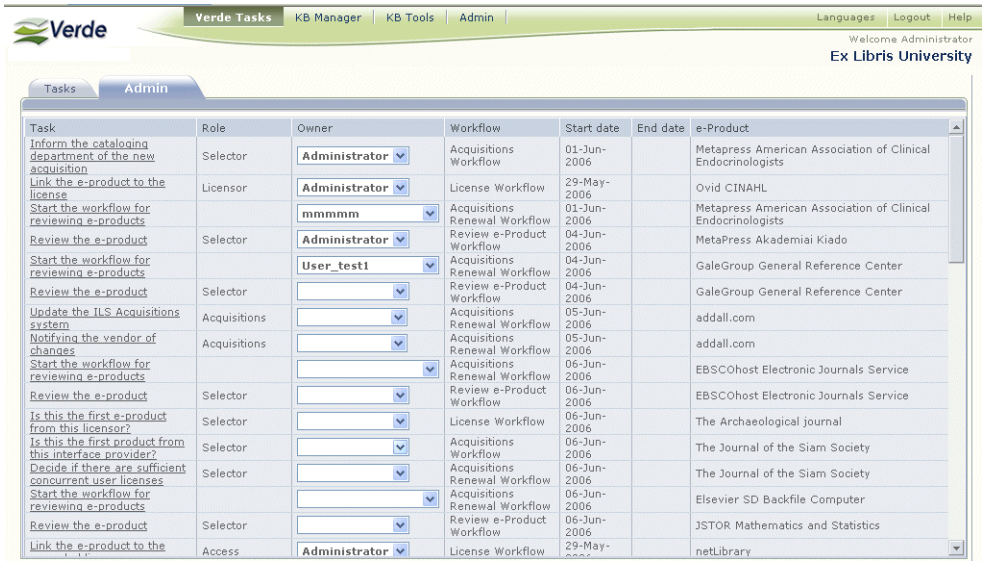


Figure 122: Verde Tasks – Admin Tab

The task summary screen displays the following information:

- Task name
- Role
- Owner – This is a pull-down menu option that lists all the users defined in the instance that have appropriate roles for performing the task and are therefore potential owners of tasks. The administrator can assign the task to one of these users by selecting the user's user name.
- Workflow
- Start date
- End date
- e-Product

The Admin user can assign tasks to a user.

Part 5

Admin Module

Part 5 contains the following:

- Section **37: Introducing the Admin Module** on page **385**
- Section **38: The Users Tab** on page **387**
- Section **39: The Code Tables Tab** on page **403**
- Section **40: The Default Values Tab** on page **417**
- Section **41: The Initial Tab** on page **419**
- Section **42: The Profiles Tab** on page **427**
- Section **43: The Configuration Tab** on page **433**

37

Introducing the Admin Module

One of the fundamental aspects of Verde is that it allows libraries to create and manage their own workflows within the scope of the Verde ERM product.

Library workflows, particularly within the ERM area, are unique in that each library has its own set of routines and procedures. As a result, a workflow management system has been developed that is flexible enough to deal with many variations but, at the same time, is simple and straightforward enough to support as a single, non-customized product.

The Verde authorization system provides three managerial roles:

- Super user
- Administrator
- Staff user

A **super user** is a cross-instance administrator who can perform the following tasks:

- Manage all users
- Manage the code tables
- Create instances

An **administrator** is a staff user with administrative rights to the specific instance to which the staff user belongs. An administrator performs the following:

- Manages all users in this instance
- Translates labels in the code table
- Sets default values for new Verde entities and objects
- Initial administrative work, such as activating e-products from SFX
- Staff user's work
- Modifies the configuration of the Summary screen.

- Configures parameters for external applications with which Verde communicates, as well as the services used for this communication

A staff user is a staff member who carries out different Verde operations. Staff users can be assigned roles such as Selection Librarian or Acquisitions Librarian, and are linked to profiles that define their permissions within the Verde framework.

Super users and administrators perform their managerial tasks in Verde's Admin module, which they can access from Verde's top menu after logging in to the system with super-user or administrator credentials. Staff users, however, do not have access to, and cannot view, the Admin module.

The Admin Module section describes the actions that may be performed within the following Admin module tabs:

- **Users** – For information on this tab, see **The Users Tab** on page **385**.
- **Code Tables** – For information on this tab, see **The Code Tables Tab** on page **385**.
- **Default Values** – For information on this tab, see **The Default Values Tab** on page **417**.
- **Initial** – For information on this tab, see **The Initial Tab** on page **385**.
- **Profiles** – For information on this tab, see **The Profiles Tab** on page **427**.
- **Configuration** – For information on this tab, see **The Configuration Tab** on page **385**.

38

The Users Tab

This section includes:

- **About the Users Tab** on page **387**
- **Creating a New User** on page **388**
- **Editing a User Record** on page **399**
- **Deleting a User** on page **400**

About the Users Tab

The **Users** tab in the Admin module displays a list of defined users.

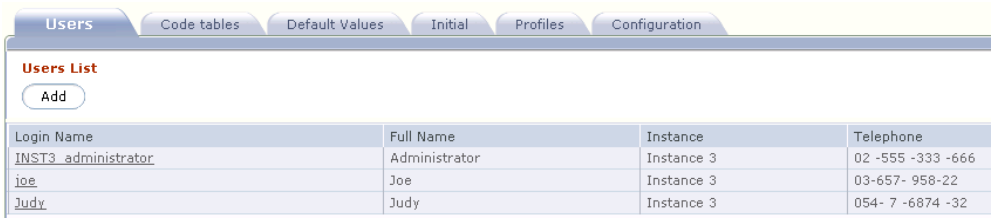


Figure 123: Users List

The Users List displays the following information for each user:

- Login Name
- Full Name
- Instance
- Telephone

Creating a New User

When you create a new user, you define the user's basic details, the profile(s) to be associated with the user, the user's role(s), and the user's privileges.

To create a new user:

1 In the **Users List**, click **Add**. The following screen is displayed.

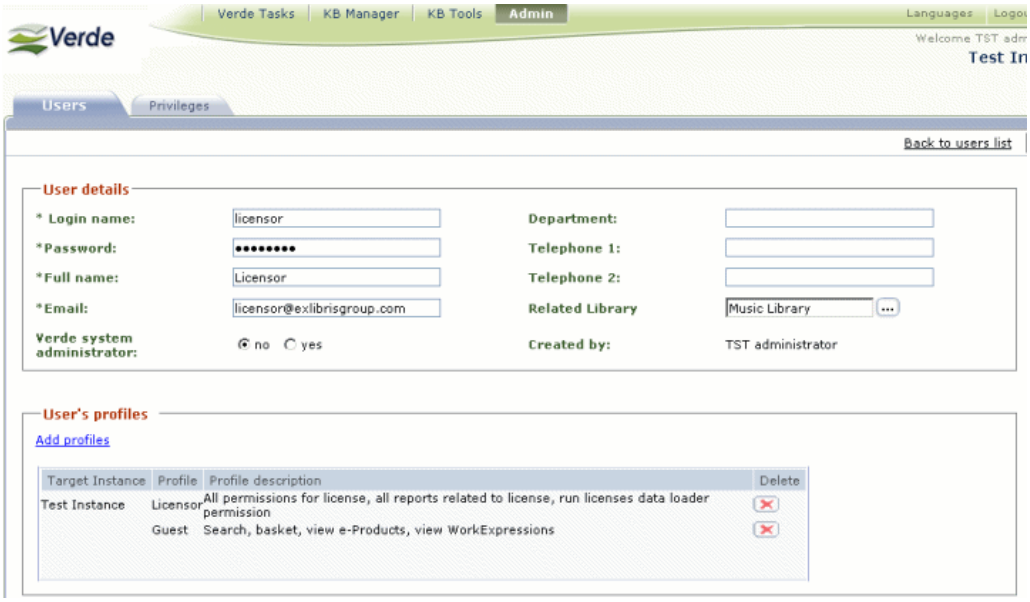


Figure 124: User Details

2 In the **User Details** section of the **Users** tab, complete the following fields:

Table 72. User Details

Field	Description
Login name (required)	The user name with which the user logs in to Verde. The login name must be unique and cannot be identical to an existing login name, even if the login name has been deleted. (This information is stored in the Verde database.)
Password (required)	The password with which the user logs in to Verde.
Full name (required)	The user's first and last names.
E-mail (required)	The user's e-mail address.

Table 72. User Details

Field	Description
Verde system administrator (Y/N)	Determines whether the user has administrator privileges. For information on managerial privileges, see **Introducing the Admin Module** on page **385**.
Department	The user's department within the organization.
Telephone 1 and 2	The telephone number(s) at which the user can be reached.
Related library	The name of the institute for which the user receives e-mail notification of workflow tasks (for e-products sponsored by the institute). If the field is empty, the user receives e-mails for all institutes. Note: Workflows and e-mail notifications must be configured for this functionality to work properly.

Note: If one of the required fields is left blank and you click **Submit**, the system returns an error message.

3 In the **User's Profiles** section of the **Users** tab, click **Add profiles**. The Select Profiles for User window opens, enabling you to select one or more (using the CTRL key) profiles from the **Profiles List** to associate with the user you are creating. If you are creating a staff user, the staff user you create will be able to perform only those functions enabled by the profile(s) with which

the user is associated. Note that there is no limit on the number of profiles that may be associated with a user.

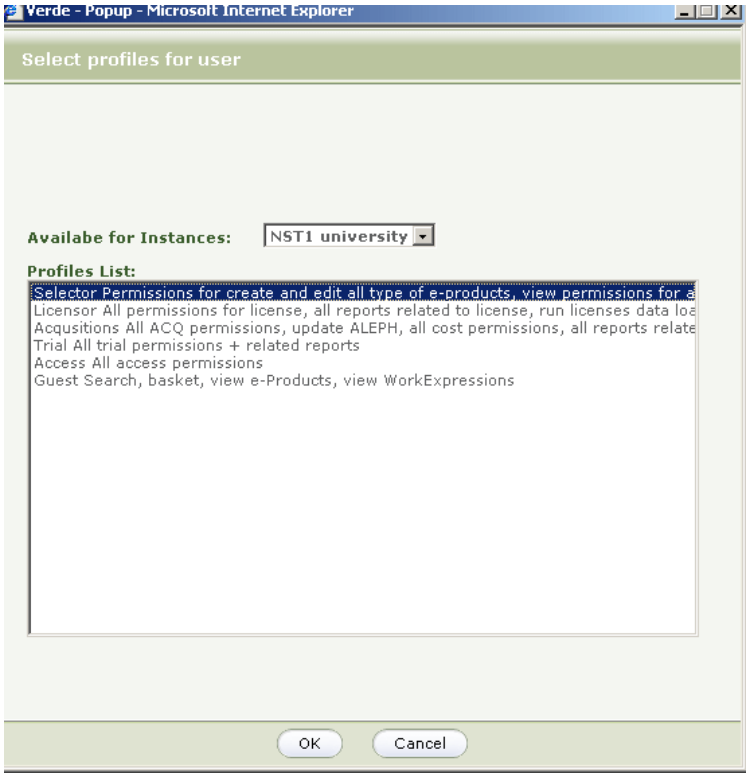

Verde - Popup - Microsoft Internet Explorer
Select profiles for user
Availabe for Instances:
NST1 university
Profiles List:
Selector Permissions for create and edit all type of e-products, view permissions for a
Licensor All permissions for license, all reports related to license, run licenses data loa
Acqusitions All ACQ permissions, update ALEPH, all cost permissions, all reports relate
Trial All trial permissions + related reports
Access All access permissions
Guest Search, basket, view e-Products, view WorkExpressions
OK
Cancel

Figure 125: Selecting User Profiles

Note: Profiles are defined in the Profiles tab of the Admin module. For details on this tab, see **The Profiles Tab** on page **427**.

Click **OK**. The profile(s) you selected are displayed under **User's Profiles**.

4 In the **User's Roles** section of the **Users** tab, select one or more of the following roles for the user you are creating:

- Access
- Acquisitions
- Acquisitions manager
- License manager
- Licensor
- Selector
- Administration
- Implementation

- Interoperability
- Legal
- Maintenance/updating
- Review/renewal
- Selection/trial/consideration

The user's role is a label or status that identifies the user as part of a functional group for alerts and searches within the library database. Note that the user's role is associated with, but not directly tied to, the permissions assigned to the user (see the following step for details on defining these). To accommodate the large array of workflows in libraries, the role-to-permissions relationship is flexible. For example, a user can have the role of license negotiator, but not have the authority to approve a license.

5 Click the **Privileges** tab and select the **KB Manager** (for details, see **KB Manager Module Privileges** on page **392**) and **KB Tools** (for details, see **KB Tools Module Privileges** on page **398**) module permissions you want to assign the user you are creating. Note that if you are creating a staff user, the permissions defined for the profile(s) with which the user is associated are read-only and displayed in red.

Figure 126: User Privileges

6 Click **Submit**. The user is created in the Verde database and displayed in the **Users List**.

KB Manager Module Privileges

In general, KB Manager module privileges include view, create/edit, and delete permissions for most attributes.

For example, the access attribute's KB Manager module privileges include the following:

- View access
- Create/edit access
- Delete access

The following table contains a detailed explanation of KB Manager module privileges.

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
Search	Search basket; view work; view e-Product	Allows the following actions: ■ Perform search ■ View e-product attributes (in the **General Information**, **Interoperability**, and **Libraries** tabs), ■ View work records ■ Add e-products to basket ■ View basket

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
Work	Create/edit work	Allows the following actions: ■ Create work records. For more information, see **Adding New Work Records** on page **36**. ■ Edit work records. For more information, see **Editing a Work Record** on page **38**. ■ Delete fields in locally created work records (except for two required fields, Title and e-Product Type) ■ Add local fields to already existing work records ■ Delete local fields in work records that are part of the KnowledgeBase
	Delete work	Allows deleting locally created work records. Users cannot delete work records that are part of the KnowledgeBase. A work record cannot be deleted if it has related e-products.

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
e-Product	Create e-interface	A user can create an e-product of each type only if the user has **Edit e-product** permissions. An e-product must be connected to a work record. ■ For details on how to create appropriate work records, see **Adding New Work Records** on page **36**. ■ For details on how to create an e-product, see **Adding New e-Product Records** on page **62**. ■ e-Products of type e-standalone, e-package, and e-interface can also be created using the Quick Add wizard. For details, see **The Quick Add Wizard** on page **64**.
	Create e-package	
	Create e-constituent	
	Create e-standalone	
	Create e-print	
	Edit e-product	Allows editing e-product attributes (in the **General Information**, **Interoperability** and **Libraries** tabs).
	Delete e-product	Allows deleting locally created e-products. e-Products cannot be deleted if they are part of the KnowledgeBase. Locally created e-products cannot be deleted if they have attributes. In a consortium environment, locally-created e products are automatically propagated to other instances. These e products can be deleted only if they can be deleted in all instances (if they have no associated attributes, e-product statuses, or selection statuses in any instances).

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
Acquisitions	Update ALEPH	Allows opening a new order in ALEPH and canceling the current ALEPH order. This permission is available only if your Verde instance is configured correctly to communicate with the ALEPH instance.
	View acquisitions	Allows viewing acquisitions.
	Create/edit acquisitions	Allows creating, editing, and linking acquisitions.
	Delete acquisitions	Allows deleting acquisitions. An acquisition record cannot be deleted if: ■ The acquisition status is **Approved**, **Active**, **Cancelled**, **Renewed**, or **Send for additional processing**. ■ The acquisition record has local acquisition and/or invoice records attached to it. ■ The acquisition record is related to a workflow.
	Activate acquisitions	Allows assigning the status **Active** to acquisitions.
	Renew acquisitions	Allows renewing acquisitions. Note: Only acquisitions with the status **Active** can be renewed.
	View local acquisitions	Allows viewing local acquisitions.
	Create/edit local acquisitions	Allows creating and editing local acquisitions.
	Delete local acquisitions	Allows deleting local acquisitions.
	View invoice	Allows viewing invoices.

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
	Creat/edit invoice	Allows creating and editing invoices.
	Delete invoice	Allows deleting invoices. **Note:** Invoices with the status **Paid** cannot be deleted.
License	View license	Allows viewing licenses.
	Create/edit license	Allows creating, editing, duplicating, linking, and pasting licenses, as well as adding prevailing terms.
	Delete license	Allows deleting licenses. A license record cannot be deleted if: ■ The license status is **Approved** or **Retired**. ■ The license record is related to workflow.
	Approve license	Allows assigning the status **Approved** to a license.
	Extend license	Allows renewing licenses. Note: Only licenses with the status **Approved** can be renewed.
	View license attachment	Allows a user to view a license attachment if the user has **View license** permissions.
	Add license attachment	Allows a user to add a license attachment if the user has **Create/edit license** permissions.
	Delete license attachment	Allows a user to delete a license attachment if the user has **Create/edit license** permissions.

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
Access	View access	Allows viewing access records.
	Create/edit access	Allows creating, editing, duplicating, and pasting access records.
	Delete access	Allows deleting access records.
	View access authorization	Allows viewing access authorization records.
	Create/edit access authorization	Allows creating and editing access authorization records.
Admin	View admin	Allows viewing admin records.
	Create/edit admin	Allows creating, editing, pasting, and duplicating admin records.
	Delete admin	Allows deleting admin records.
	View breach	Allows viewing breach records.
	Create/edit breach	Allows creating, editing, and duplicating breach records.
	Delete breach	Allows deleting breach records.
	View incident	Allows viewing incidents.
	Create/edit incident	Allows creating, editing, and duplicating incident record
	Delete incident	Allows deleting incidents.
Trial	View trial	Allows viewing trial records.
	Create/edit trial	Allows creating and editing trial records.
	Delete trial	Allows deleting trial records. **Note:** Only trial records with the status **Requested** or **On hold** can be deleted.
Cost	View cost	Allows viewing cost records.
	Create/edit cost	Allows creating, editing, and duplicating cost records.
	Delete cost	Allows deleting cost records.

Table 73. KB Manager Module Privileges

Attribute	Privilege	Description
Usage	View usage	Allows viewing usage records.
	Create/edit usage	Allows creating, editing, and duplicating usage records.
	Delete usage	Allows deleting usage records.
Workflow	Handle a workflow	Allows handling a workflow.
	Start a workflow	Allows starting license and acquisition workflows.
	Cancel a workflow	Allows canceling a workflow.
Library	View library	Allows viewing library, library contact, IP range, and proxy server records.
	Create/edit library	Allows creating and editing library, library contact, IP range, and proxy server records. Also allows deleting of library contact, IP range, and proxy server records.
	Delete library	Allows deleting library, library contact, IP range, and proxy server records. Note: A library that is being used in the environment (for example, the library is selected as a sponsoring library for a certain e-product) cannot be deleted.
Organization	View organization	Allows viewing organizations and organization contacts.
	Create/edit organization	Allows creating and editing organization and organization contact records. Also allows deleting organization contacts.

KB Tools Module Privileges

The KB Tools module privileges include a list of Verde reports, tasks, and loaders. For most of these, there is a separate **Run** permission that allows running a job and viewing the job output. For example, a user with **Run**

general report permissions can run a general report and view its results in **KB Tools > View Report Output**.

The following table contains an explanation of KB Tools module privileges.

Table 74. KB Tools Module Privileges

Privilege	Description
Run report	Allows running a report and viewing the report output.
Run task	Allows running a task and viewing the task output.
Run loader	Allows running a loader and viewing the loader output.
Run SFX synch	Allows running the synchronization process in two modules: KB Tools and KB Manager. The synchronization process for an individual e-product may be triggered by clicking on the **Synch with SFX** button in the KB Manager module. The batch synchronization process that handles all e-products that require synchronization is available from the KB Tools module. For details on the synchronization process, see **Performing Synchronization** on page **491**.
Run LKB update reports	Allows viewing results of the Verde task that updates the local KnowledgeBase. For more information, see **Viewing KB Reports** on page **369**.
View scheduled tasks	Allows viewing details of all the jobs that have been scheduled.

Editing a User Record

You can edit existing user records.

To edit an existing user record:

1 In the **Users List**, click the user's login name.

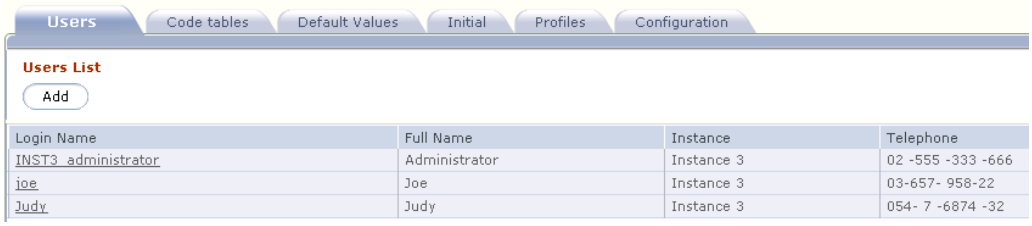


Figure 127: Users List

The following screen is displayed.

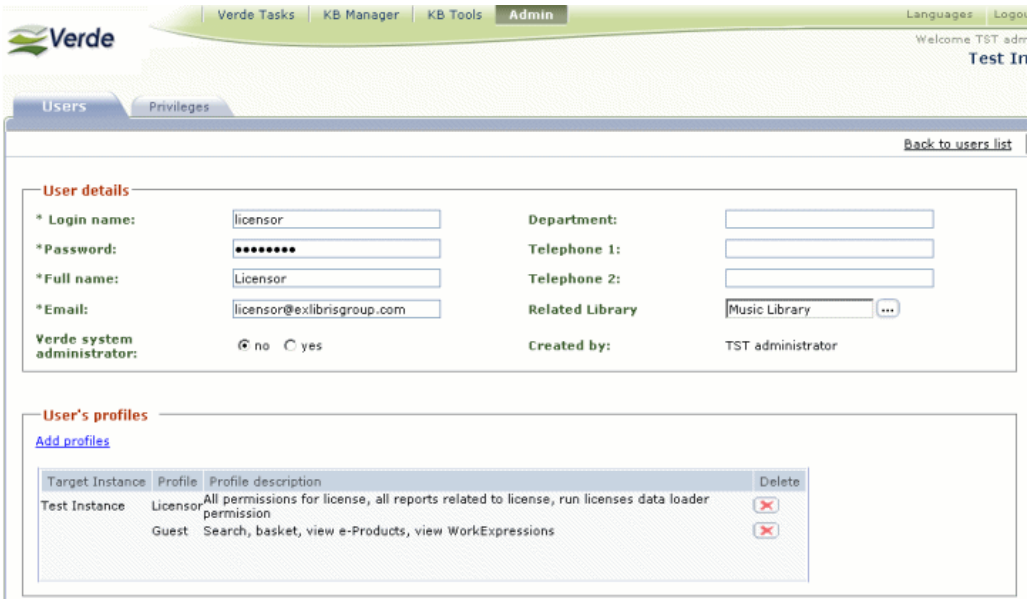


Figure 128: User Details

2 Edit the user's properties as required. For details, see **Creating a New User** on page 388.

3 Click **Submit**. Your modifications are saved in the Verde database.

Deleting a User

You can remove a user from both the Users List and Verde database.

To delete a user:

1 In the **Users List**, click the user's login name.

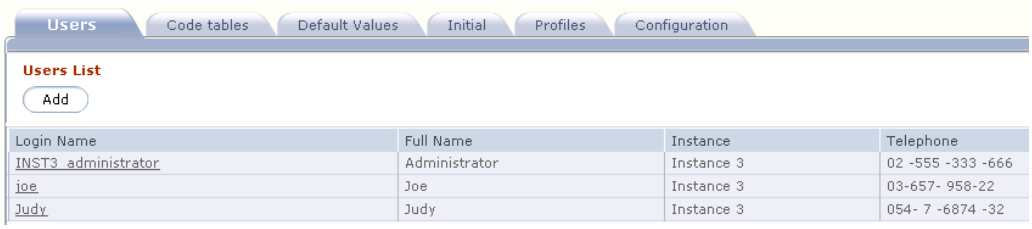


Figure 129: Users List

2 In the screen that opens, click the **Delete** button that appears in the top right corner.

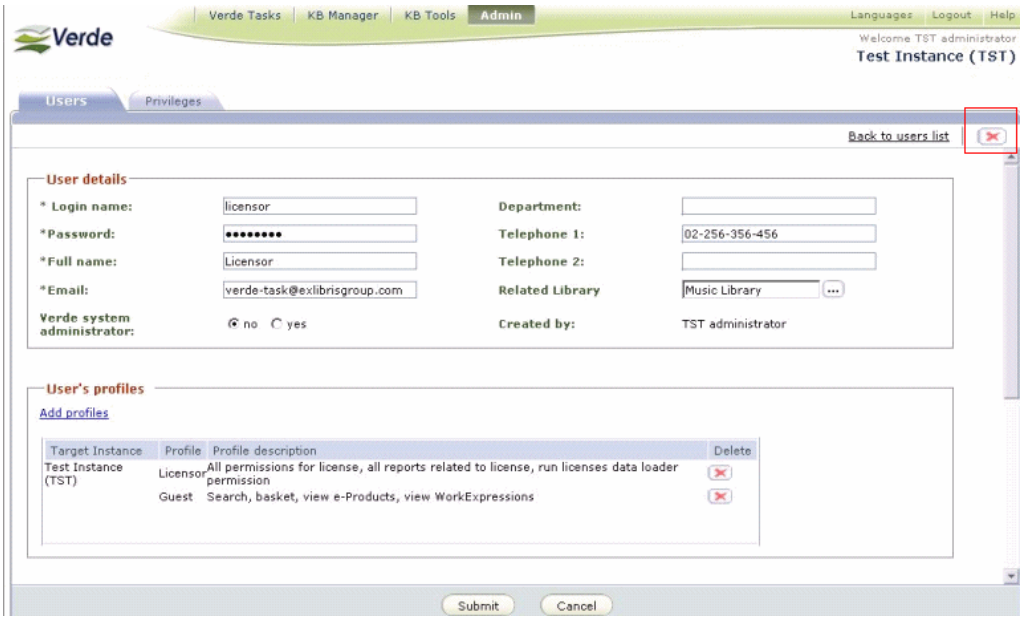


Figure 130: Delete User

3 Click **Yes** to confirm deletion. The user is deleted from the Users List and from the Verde database.

Note: Instance administrators (created during installation, with the instancename_administrator naming convention) cannot be deleted.

39

The Code Tables Tab

This section includes:

- **About the Code Tables Tab** on page **403**
- **Updating a Code Table** on page **404**

About the Code Tables Tab

The **Code Tables** tab in the Admin module offers libraries the option of localizing the various code tables of a Verde instance. Using this tab, the names of fields can be changed to reflect local practices and terminology.

The following tables can be localized:

- Cost
- Organization
- Access
- Breach
- Verde Task
- Privileges
- e-Product
- Usage
- Work
- Local use terms
- Acquisition
- License
- Incident

- Admin
- Trial

Updating a Code Table

You use the Code Tables tab to localize the code tables for your Verde instance.

To update a code table:

1 In the Admin module's **Code Tables** tab, select the topic whose table you want to modify.

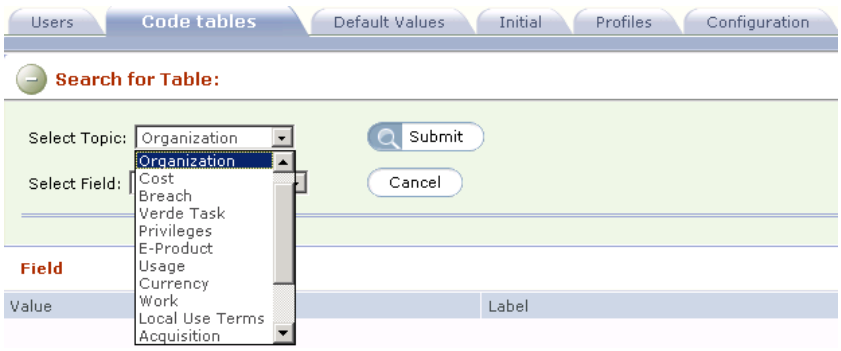


Figure 131: Code Tables

2 From the **Select Field** box, select the specific field within the table that you want to modify. For example, if you selected the **Cost** table in step 1, you can choose to modify the **Amount** or **Type** field.

3 Click **Submit** in the **Search for Table** section. The selected field's values and default names (labels) are displayed. A **Note** column, in which you can record notes applicable to each field value, is also displayed.

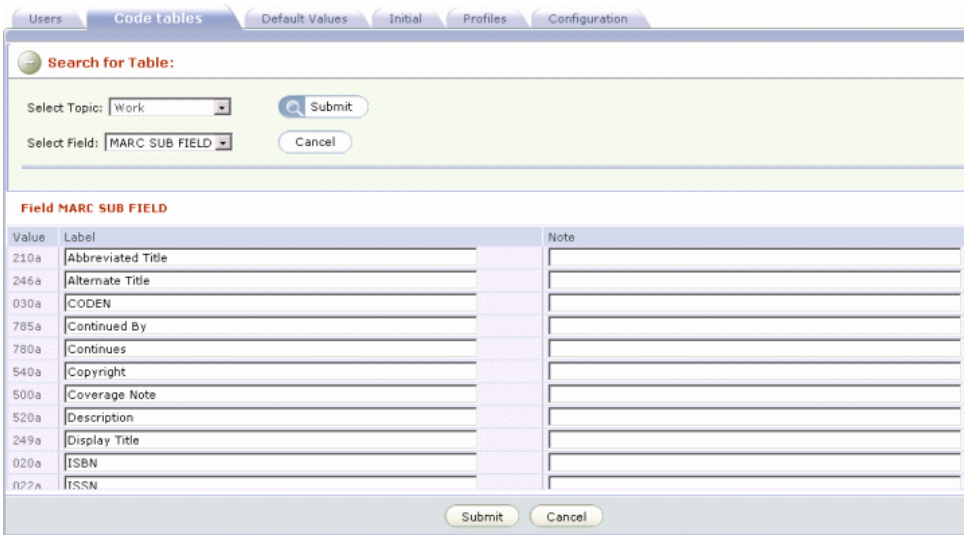


Figure 132: Field's Values and Default Names

4 Enter changes to each field value as required.

Note: Values can only be modified, not deleted.

5 Click **Submit** to save your changes. The following message is displayed.

Figure 133: Code Table Message

Note: If a change is made to an indexed field in a site that has local data, indexes should be rerun so that they contain the new labels. The following fields are indexed: **e-Product status**, **e-Product selection status**, **e-Product package type**, **e-Product type**, **Acquisition status**, **Trial status**, and **License status**.

Updating Functional Fields

Certain fields have functional aspects to them. When you change the related labels of such fields, you must ensure that the new labels match the functionality of these fields. The following tables include functional fields: **e-Product**, **Work**, **License**, **Acquisition**, **Trial**, **Privileges**, **Verde Task**, and

Organization. Details of the functional fields in each of these tables are listed in the following sections.

e-Product

Table 75. e-Product Table Functional Fields

Field	Values	Notes
Activity status	■ Down ■ Up	Changing the activity status triggers the **Availability** task. This task updates the availability status of the parallel SFX item. For more information, see **Verde-SFX Interoperability** on page **476**.
e-Product status	■ Null ■ Implementation 1 ■ Implementation 2 ■ Implementation 3 ■ Trial ■ Production ■ Withdrawn	Assigning an e-product status makes the e-product active or inactive, according to the e-product status as well as the activation start and end dates. Activation and deactivation typically occur after the evaluation process is run. For information about e-product activation, see **Activation** on page **77**. For information about e-product deactivation, see **Rejection** on page **76**. Activation and deactivation of e-products triggers the synchronization process that updates the parallel SFX item. For more information, see **Synchronizing e-Product Updates with SFX** on page **481**.

Table 75. e-Product Table Functional Fields

Field	Values	Notes
Operation	■ Summary ■ e-Product ■ Acquisition ■ License ■ Access ■ Admin ■ Trial ■ Cost ■ Usage ■ Workflow ■ Sync History	These are e-product attribute labels. For more information about e-product attributes, see the following sections: ■ **e-Product Summary Tab** on page **51** ■ **Acquisition Records** on page **85** ■ **License Records** on page **103**. ■ **Access Records** on page **119** ■ **Admin Records** on page **129** ■ **Trial Records** on page **143** ■ **Cost Records** on page **151** ■ **Usage Records** on page **155** ■ **Workflows** on page **159** ■ **Monitoring Synchronization History** on page **499**
Selection status	■ Null ■ Approved ■ Evaluation ■ Final Approval ■ Rejected ■ Withdrawn by publisher ■ Review	The selection statuses are used in Verde workflows pertaining to e-product records. For more information about selection workflows, see **Selection Workflows** on page **73**. For more information about the Verde workflow engine, see **About Verde Workflows** on page **159**. Selection processes involve online and batch updates as well as Verde reports. The processes rely on relationships between e product records as well as between e product and acquisition records. The selection process is closely related to acquisition workflows. For more information about acquisition workflows, see **Acquisition Workflows** on page **100**.

Table 75. e-Product Table Functional Fields

Field	Values	Notes
Tier	■ Managed for all ■ Managed for some ■ Managed locally	The tier level is relevant only if you are working in a shared consortium environment. Resources in a shared consortium environment fall into one of two categories: managed centrally or managed locally. Resources that are managed centrally are activated in the center for one or more member instances. Resources that are managed locally are activated, acquired, and licensed by the member instance in the member instance. For more information, see **Working in a Shared Consortium Environment** on page **453**.
Update target	■ ILS ■ MetaLib ■ Null ■ SFX ■ SFX and MetaLib	Indicates the system for update. The current functionality is related to the Verde-SFX synchronization process. If the value of the **Update target** field is **SFX**, the parallel SFX item is updated with the value of the Verde e-product. If the value of the **Update target** field is not **SFX**, the information is not sent to SFX.
e-Package type	■ Aggregator ■ Selective	These are two types of packages: ■ **Aggregator packages** are inclusive. All related e-constituents are automatically included when an aggregator package is selected in Verde. Acquisitions and licensing are always performed at the level of the package. ■ **Selective packages** are those containing multiple e-constituents. The library can select either all the e-resources in the package or individual e-resources that are part of the package.

Work

MARC sub-fields and MARC tags can be updated in the Work table. These fields are indexed and used in searches. They are described in the following table.

Table 76. Work Table Functional Fields

Tag Value	Tag Label	Searchable By
010	LCCN	All, Identifier
020	ISBN	All, Identifier
022	ISSN	All, Identifier
030	CODEN	All, Identifier
090	SFX	All, Verde Identifier
098	MetaLib ID	All, Verde Identifier
100	Author	All, Organization
110	Corporate Author	All, Organization
210	Abbreviated Title	All, Title
245	Title	All, Title,
249	Display Title	All, Title
260	Imprint	All
310	Update Frequency	All
500	Coverage Note	All
520	Description	All,
540	Copyright	All
546	Language	All
650	Category	All, Category
655	e-Product Type	All
659	e-Product Format	All
776	eISSN/Eisbn	All, Verde Identifier
780	Continues	All, Title
785	Continued By	All, Title
900-908	Local 1 -9	All, Local fields
969	Local Category	All, Local fields, Category, Local Category

License

Table 77. License Table Functional Fields

Field	Values	Notes
License status	■ Approved ■ Approved locally ■ Awaiting local signature ■ Electronic version created ■ Final legal version received ■ Awaiting vendor generic license ■ In negotiation ■ Pending licensor response ■ Pending local response ■ Pending final local signature ■ Under local review ■ New ■ Redacted version created ■ Rejected ■ Retired ■ Pending final signature by licensor ■ Under review	The **License status** is a mandatory field. Once a license has been assigned a status of **Approved** or **Retired**, it cannot be deleted. Only licenses with the status **Approved** are handled by the **License Renewal** Task. The license's status plays a significant role in the license workflow. For more information, see **License Records** on page **103**.

Table 77. License Table Functional Fields

Field	Values	Notes
License type	■ Prevailing ■ Regular ■ Supplemental ■ Trial	The default license type is **Regular**. A license with the type **Trial** is created automatically by the system during a trial process when the **License required** check box is selected in the license record. A prevailing term record must be defined when there is more than one active license.
Renewal type	■ Automatic ■ Explicit ■ Perpetual	The **License Renewal** task renews licenses that are about to expire whose renewal type is defined as **Automatic**. For more information see **License Workflows** on page **117**.

Acquisition

Table 78. Acquisition Table Functional Fields

Field	Values	Notes
Payment status	■ Paid ■ Ready to be paid ■ Unpaid	The invoice payment status. The default status is **Paid**. Invoices with the status **Paid** cannot be deleted.

Table 78. Acquisition Table Functional Fields

Field	Values	Notes
Status	■ Active ■ Approved ■ Cancelled ■ Denied ■ New ■ On hold ■ In process 1 ■ In process 2 ■ Ready to be approved ■ Renewed ■ Review ■ Sent for additional processing	The **Status** field is a mandatory field whose default is **New**. The field plays a significant role in Verde workflows. Once an acquisition has been assigned a status of **Active**, **Approved**, **Renewed**, or **Cancelled**, it cannot be deleted. Assigning the status **Review** initiates the **Review e-Product** workflow. The status may be assigned manually or by the **Subscriptions for Review** task. For more information, see **Renew Acquisitions and Review e-Product Workflows** on page **161**. The **Subscriptions for Review** task handles acquisitions with the statuses **Active** and **Renewed** if **Auto renewal** is set to **No** in the acquisition record. The **Subscription Renewal** task handles acquisitions with the statuses **Active**, **Renewed**, and **Review** if **Auto renewal** is set to **Yes** in the acquisition record.

Trial

Table 79. Trial Table Functional Fields

Field	Values	Notes
Trial decision status	■ Null ■ Purchase ■ Do not purchase ■ Deferred	The **Trial decision status** field is a mandatory field that causes an update to the e-product's selection status, as follows: ■ If the value of this field is **Purchase**, the selection status of the e-product is updated to **Approved**. ■ If the value of this field is **Do not purchase**, the selection status of the e-product is updated to **Rejected**. ■ If the value of this field is **Deferred**, the selection status of the e-product is not updated. Trial participants are alerted to the decision status. Note that the decision status can be changed before the trial has been completed.
Trial status	■ Requested ■ Approved ■ On trial ■ On hold ■ Trial over	The **Trial status** is a mandatory field that may be updated either manually or by the **Trial Management** task. The task updates the trial's status according to trial's start and end dates, as follows: ■ From the status **Approved** to the status **On hold** or **On trial** when the start date is reached. ■ Fromthe status **On trial** to the status **Trial over** when the end date is reached. All other changes should be performed manually. For more information about trial participant alerts, see **Trial Workflow** on page 148.

Privileges

Table 80. Privileges Table Functional Fields

Field	Values	Notes
Permission	KB Tools and KB Manager permissions	Verde permissions allow performing certain actions in the KB Manager and KB Tools modules. For details see **KB Manager Module Privileges** on page **392** and **KB Tools Module Privileges** on page **398**.
Profile	Default profile names: ■ Access ■ Acquisitions ■ Guest ■ Licensor ■ Selector ■ Trial	Profile definitions include specific, granular authorizations or permissions, as well as restrictions. A staff user associated with a particular profile is able to activate only those functions allowed by this profile. For more information see **The Profiles Tab** on page **427**.
Role	■ Access ■ Acquisitions ■ Acquisitions manager ■ Administration ■ Implementation ■ Interoperability ■ Legal ■ License manager ■ Licensor ■ Maintenance/ updating ■ Review/renewal ■ Selector ■ Selection/trial/ consideration	Users are assigned one or more roles. A role is defined for each task in a workflow. A user that has the appropriate role becomes the potential owner of a task. If only one user has been assigned this role, all tasks with this role will automatically be assigned to this user. Users can view only the tasks linked to their roles in the Verde Tasks module.

Verde Task

Table 81. Verde Task Table Functional Fields

Field	Values	Notes
Verde task name	Report, task, and loader names	There is a list of reports, tasks, and loaders. For more information on these, see **Introducing the KB Tools Module** on page 177.

Organization

Table 82. Organization Table Functional Fields

Field	Values	Notes
Role	Instance Institute Licensing agent Consortial member Consortium Interface provider Licensee Licensor Vendor	There are three main entities in Verde: **e-product**, **library** and **organization**. This table includes roles for libraries and organizations. **Instance** and **Institute** are library (institution) roles. A single instance can support one or more libraries. All libraries within one instance share the e-products and the key e-product attributes, such as acquisitions, license, trial, access, and admin. The local acquisition, cost, and usage records can be created at the library level. In addition, it is possible to record resource access authorization information at the library level (that is, whether or not the library may access specific resources). All other roles in the list are organization roles. The role determines the organization's relationship to an e-product. For example, the organization type **Interface provider** can be associated with an e-interface. Each organization can have multiple roles.

40

The Default Values Tab

This section includes:

- **About the Default Values Tab** on page **417**
- **Defining Default Values for a License Record** on page **418**

About the Default Values Tab

The **Default Values** tab in the Admin module enables you to define default values for certain e-product attribute record fields. This helps increase the efficiency with which library staff can input data.

At the present time, default values can be defined for license records only. However, this functionality will be added to other types of records in the future.

Defining Default Values for a License Record

You can define default values for certain license record fields.

To define default values for a license record:

1 In the Admin module, click the **Default Values** tab. The license record **Description** and **Terms** tabs display only the fields for which default values can be defined.

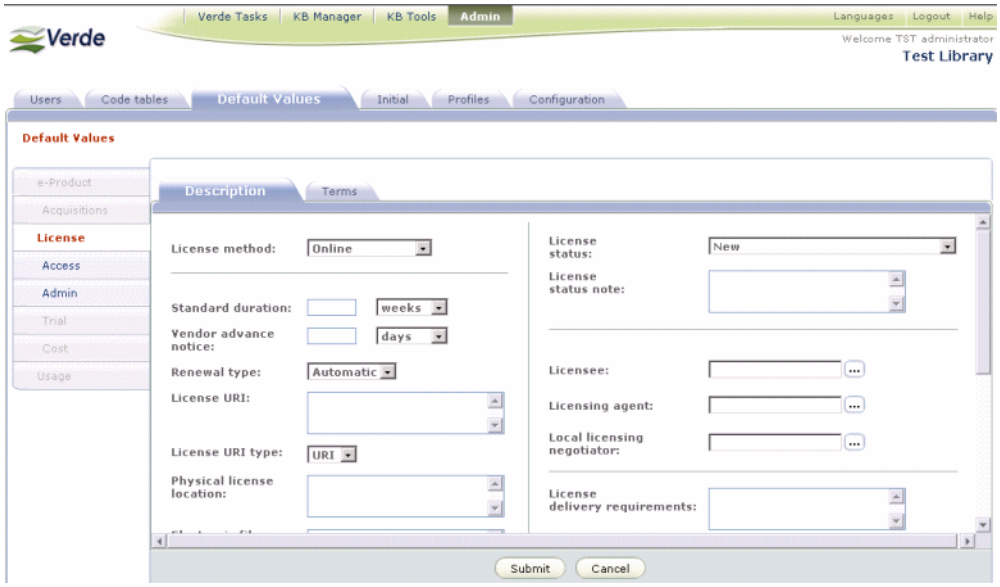


Figure 134: Default Values

2 Define default values for the displayed fields. For an explanation of each of these fields, see **License Record Tabs** on page **109**.

3 Click **Submit**. A staff user can now view the default values you defined when creating a new license record in the KB Manager module.

41

The Initial Tab

This section includes:

- **About the Initial Tab** on page **419**
- **Converting Acquisitions** on page **420**
- **Loading Acquisitions** on page **420**
- **Localizing Records** on page **423**
- **Re-indexing** on page **425**

About the Initial Tab

The **Initial** tab in the Admin module enables you to perform certain actions during the initial, setup phase of a Verde installation.

The following options are available in this tab and described in this section:

- Convert acquisitions
- Load acquisitions
- Localization
- Re-index

Note: The conversion and loading of acquisition and vendor records from ALEPH to Verde is described in detail in the *ALEPH-Verde Interoperability Guide*.

Converting Acquisitions

The acquisition conversion process enables you to take an input file from ALEPH and convert it to a format that can be loaded into the Verde database.

To convert an acquisition:

1. Transfer the ALEPH XML export file of an acquisition record to the following location on the Verde server:

   `$VERDE_BASE/home/data/import/`

2. In the Admin module's **Initial** tab, click **Convert Acquisitions**. The process assumes that there is a file to be converted in the `..data/import` directory.

3. Click **Submit** to convert the acquisition record. When the conversion process is completed, the following files are created:

   - `$VERDE_BASE/home/data/import/acqToStandard.xml`
   - `$VERDE_BASE/home/data/import/acqRejectedNumbers.xml` – This file includes the following information for each rejected record: the number of records in the input file, the identifier, the title, the e-product type, the acquisition number, and the order number.

Note: You can monitor the conversion process by viewing the `$VERDE_BASE/home/system/log/acqConvert.log` log file.

Loading Acquisitions

After the ALEPH input file has been converted, it can be loaded into the Verde database using one of the following acquisition loading options:

- **Load acquisition data that is in XML format** – The XML format is usually the result of exporting acquisition data from ALEPH and converting it to XML format as described in **Converting Acquisitions** on page **420**. However, any input file that is in the required XML format (see **Acquisition Input File Structure** on page **422**) can be loaded into the Verde database using the batch process described below.
- **Load acquisition data that is in a tab-delimited file** – Tab-delimited files can be loaded from the KB Tools module. For details, see **Overview of Loaders** on page **231**.

Note: Make sure that ALEPH sub-libraries are defined as libraries in Verde. Codes identical to those in ALEPH must be used. During acquisition loading, the system checks whether the ALEPH and Verde codes match. If a library code that appears in the **<Organization>** field in the `acqToStandard.xml` file does not exist as Verde, the acquisition record is rejected.

To load acquisitions that are in XML format:

1. In the Admin module's **Initial** tab, click **Load Acquisitions**. The process assumes that there is an `acqToStandard.xml` file in the `..data/import` directory.
2. Click **Submit** to run the batch process and load the file into the Verde database.

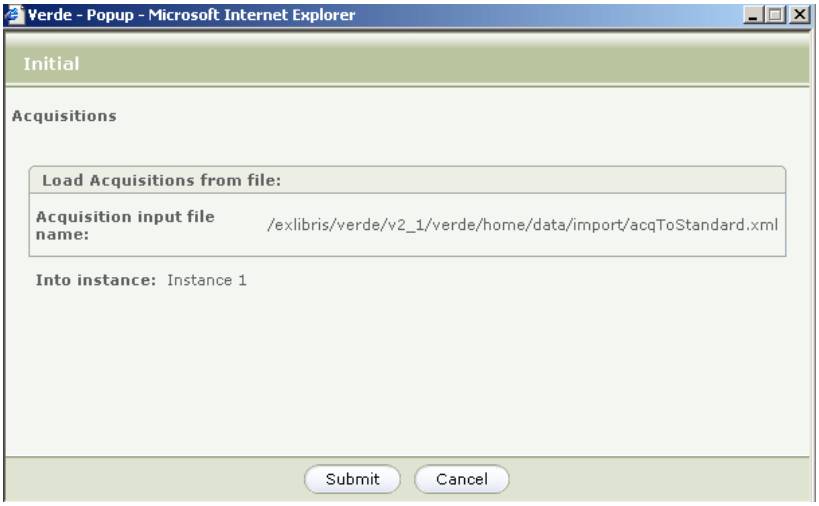


Figure 135: Load Acquisitions

Note: You can monitor the load process by viewing the `$VERDE_BASE/home/system/log/acqLoad.log` log file.

Acquisition Input File Structure

The acquisition input file must be in the following XML format:

```
<Acquisitions>
<Acquisition>
<WorkExpressionData>
<Isbn></Isbn>
<Issn></Issn>
<EIssn></EIssn>
<Title></Title>
</WorkExpressionData>
<EProductAndSubscriptionPeriodData>
<EProductType></EProductType>
<HoldingsData></HoldingsData>
<ILSProductId></ILSProductId>
<ILSHoldingsIds></ILSHoldingsIds>
<SubscriptionStartDate></SubscriptionStartDate>
</EProductAndSubscriptionPeriodData>
<AcquisitionData>
<AcquisitionNumber></AcquisitionNumber>
<OrderNumber></OrderNumber>
<OrderDate></OrderDate>
<StartDate></StartDate>
<EndDate></EndDate>
<RenewCancelDate></RenewCancelDate>
<OrderForm></OrderForm>
<OrderSendMethod></OrderSendMethod>
<MethodOfAcquisition></MethodOfAcquisition>
<MaterialType></MaterialType>
<Organization></Organization>
<NoCopies></NoCopies>
<Price></Price>
<DiscountOnPrice></DiscountOnPrice>
<VendorId></VendorId>
<VendorCode></VendorCode>
<VendorNote></VendorNote>
<ILSSubscriptionId></ILSSubscriptionId>
<ILSNote></ILSNote>
<Budgets></Budgets>
<Status></Status>
<StatusDate></StatusDate>
</AcquisitionData>
</Acquisition>
</Acquisitions>
```

Localizing Records

You use the localization process for input files created by SFX. These files are used to update Verde and ensure that SFX and Verde are synchronized.

The first step in the process is to use the SFX export tool in order to create a localization file. The localization file provides the following data from SFX: status, institute settings, locally created targets, target services, objects, and object portfolios. For more information, refer to the *Verde-SFX Interoperability Guide*.

The second step (optional) is to create a file that provides auto-activate status for target services. The SFX auto-activate status matches SFX selective e-package types (complete or partial) to their Verde counterparts. To create this file, you must run the auto-activate script on your SFX server. For more information, refer to Section 4.14 in the *SFX System Administrator Guide*.

After creating the export file(s), FTP the file(s) to your Verde server or save the file(s) on your local PC. You are then ready to initiate the localization process from the Admin module's **Initial** tab.

To run the localization process:

1 In the Admin module's **Initial** tab, click **Localization**. The following window is displayed.

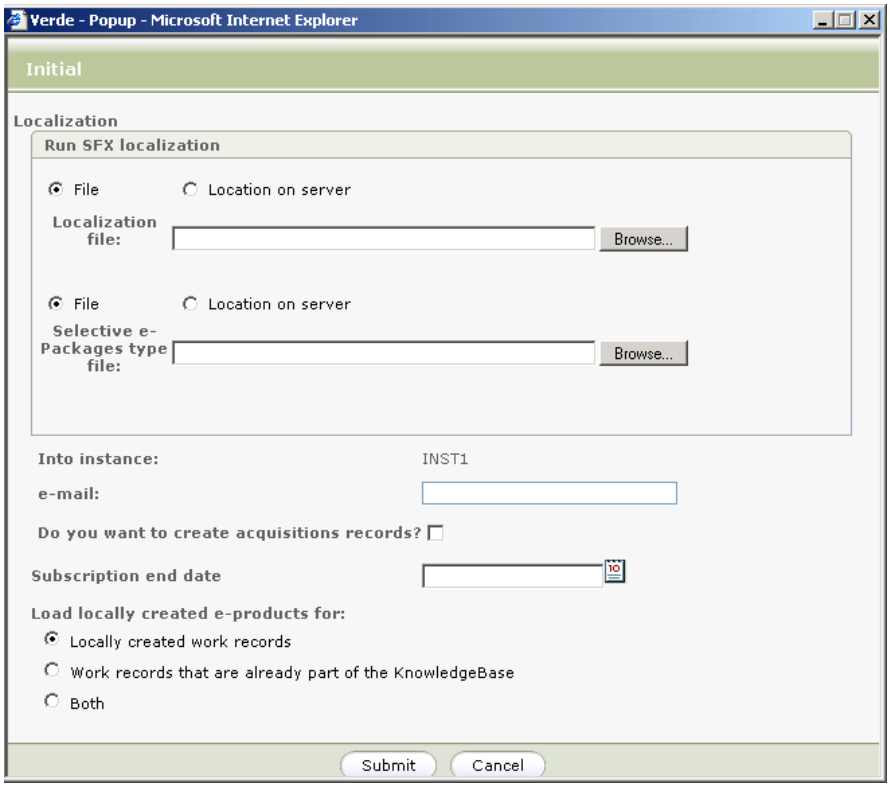


Figure 136: Localization

2 Under Run SFX Localization, choose one of the following options for the file(s) you want to localize:

- If the file is on your PC, select **File** and browse to locate the file on your machine.
- If the file is on the Verde server, select **Location on server** and enter the path and name of the input file.

3 In the **E-mail** text box, enter the e-mail address(es) to which you want Verde to send a notification e-mail when the localization process is complete. Use semicolons to separate between the e-mail addresses you enter.

4 Select **Do you want to create acquisition records?** if you want to create an acquisition record for every e-package activated by the localization process. The acquisition record is assigned a status of **In Process 1**, a start date equal to the date on which the localization process is run, and an end date as specified in the following step.

5 If you selected **Do you want to create acquisition records?**, enter or select an end date to assign these records in the **Subscription end date** box.

6 Under Load locally created e-products for, select one of the following options:

- **Locally created work records** – Creates local e-products for local work records only. e-Products that are linked to work records that are already part of the KnowledgeBase will not be loaded.
- **Work records that are already part of the KnowledgeBase** – Creates local e-products only for work records that are part of the KnowledgeBase. Local e-products that are linked to local work records will not be loaded.
- **Both** – Loads all local e-products, regardless of the work record to which they are linked.

7 Click **Submit**. The localization process updates Verde so that the same resources are active in SFX and Verde. Resources that are active in SFX are assigned an e-product status of **Production** and an **Activation from date** that is equal to the date on which the localization process is run.

Note: While the localization process is running, you cannot use the Verde GUI.

Re-indexing

In the Admin module's **Initial** tab, click **Reindex**. A general indexing process is triggered in the active instance (the instance to which you logged in). During the process, Verde indexes all workexpressions and e-products that were updated locally.

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The Profiles Tab

This section includes:

- **About the Profiles Tab** on page **427**
- **Creating a New Profile** on page **428**
- **Editing a Profile Record** on page **430**
- **Deleting a Profile** on page **431**

About the Profiles Tab

Profile definitions include specific, granular authorizations or permissions, as well as restrictions. A staff user associated with a particular profile is able to activate only those functions allowed by this profile.

Note: In a shared consortium, users within any one of the local instances must have a guest profile for the central instance. For more information, see **Setting Up Guest Profiles** on page **449**.

The **Profiles** tab in the Admin module displays a list of predefined profiles.

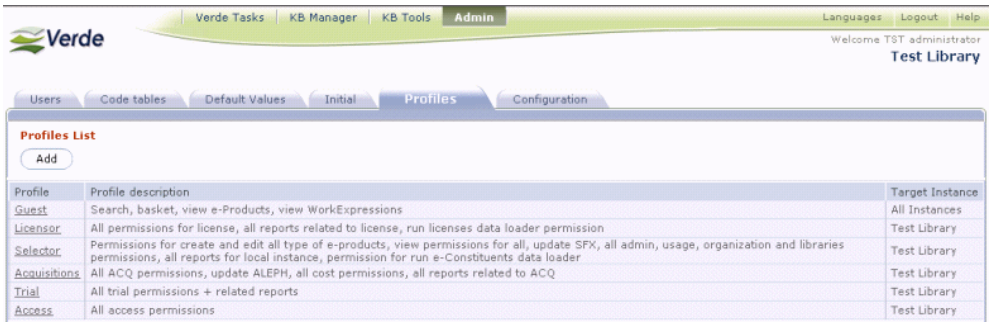

Figure 137: Predefined Profiles List

The Profiles List displays the following information for each profile:

- Profile
- Profile Description
- Target Instance

Creating a New Profile

When you create a new profile, you must define the profile's details, the instance(s) for which the profile is available, and the privileges applicable to the profile.

To create a new profile:

1 In the **Profiles List**, click **Add**. The following screen is displayed.

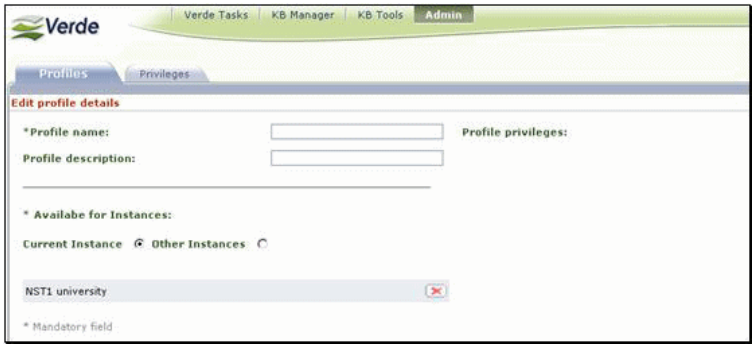

Figure 138: Profiile Details

2 In the **Edit Profile Details** section of the **Profiles** tab, enter the name you want to assign the profile (required field) and a description of the profile that defines its function.

3 Under **Available for Instances**:

- If you are working in a single-instance environment, select **Current instance** (the default option).
- If you are working in a multi-instance environment and want to make the profile you are creating available to other instances, select **Other**

instances. The screen expands, enabling you to select **All instances**, or specific instances from the **List of instances** drop-down list.

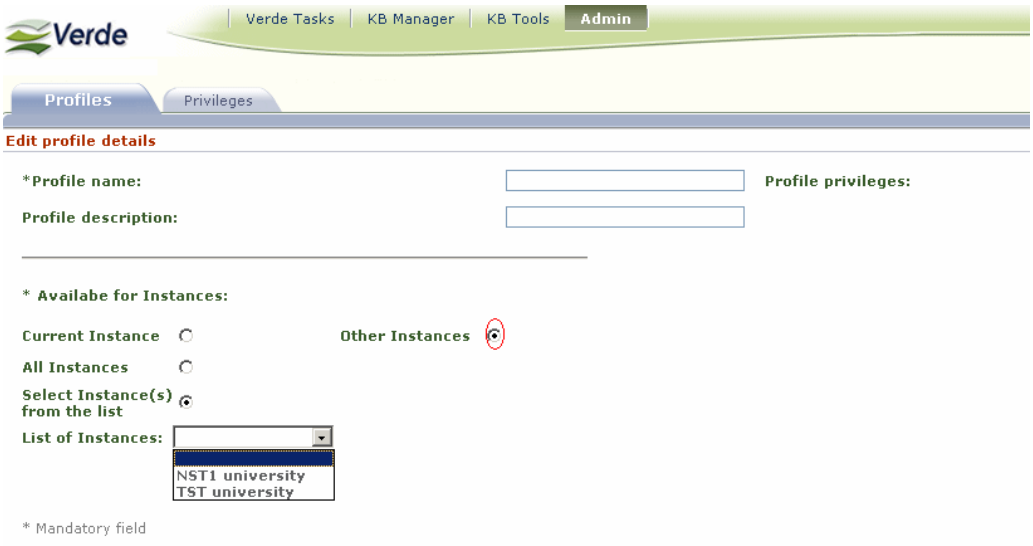

Figure 139: Profile Details for Multi-Instance Installations

4 Click the **Privileges** tab and select the **KB Manager** (for details, see **KB Manager Module Privileges** on page **392**) and **KB Tools** (for details, see **KB Tools Module Privileges** on page **398**) module permissions you want to assign to the profile you are creating.

5 Click **Submit**. The profile is created in the Verde database and you can view a summary of the profile permissions you defined in the **Profiles** tab, under **Profile Privileges**.

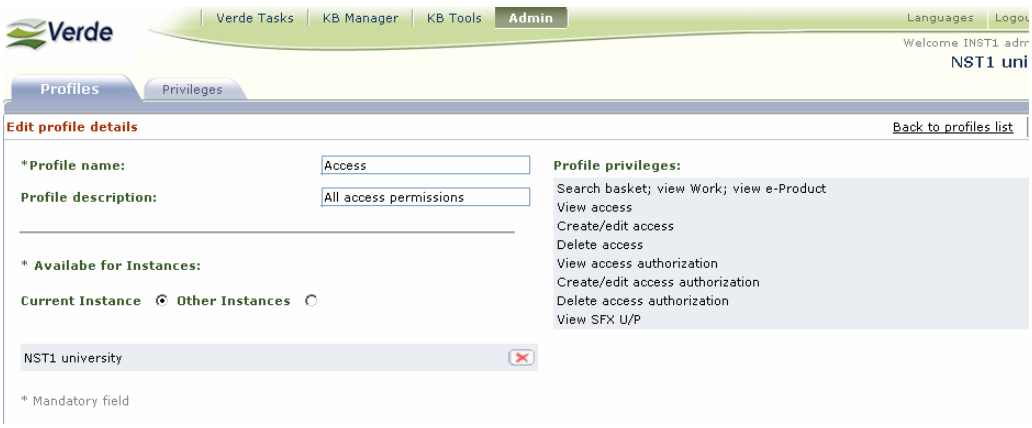

Figure 140: Summary of Selected Permissions

Editing a Profile Record

You can edit existing profile records.

To edit an existing profile record:

1 In the **Profiles List**, click the name of the profile.

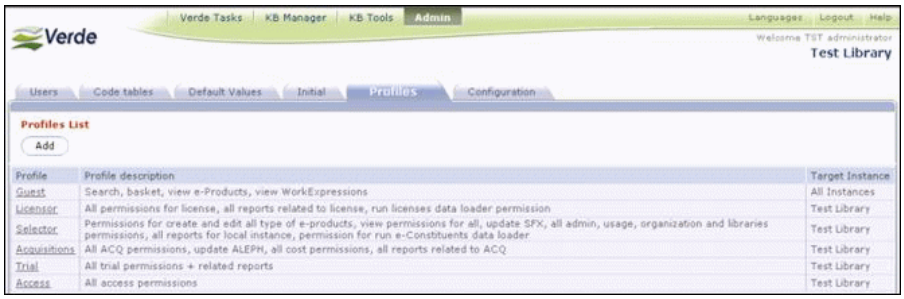

Figure 141: Profiles List

The following screen is displayed.

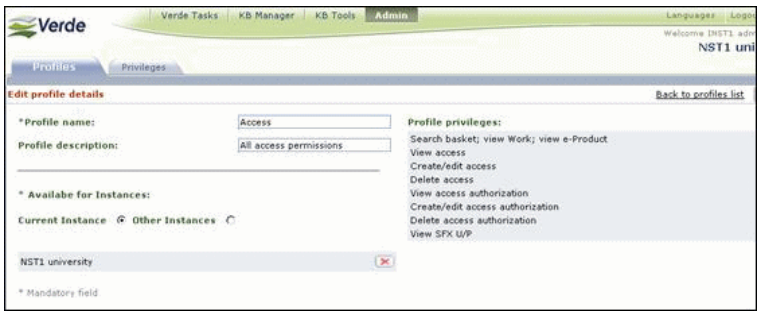

Figure 142: Edit Profile Details

2 Edit the profile's properties as required. For details, see **Creating a New Profile** on page 428.

3 Click **Submit**. Your modifications are saved in the Verde database.

Deleting a Profile

You can remove a profile from both the Profiles list and Verde database.

To delete a profile:

1 In the **Profiles List**, click the name of the profile.

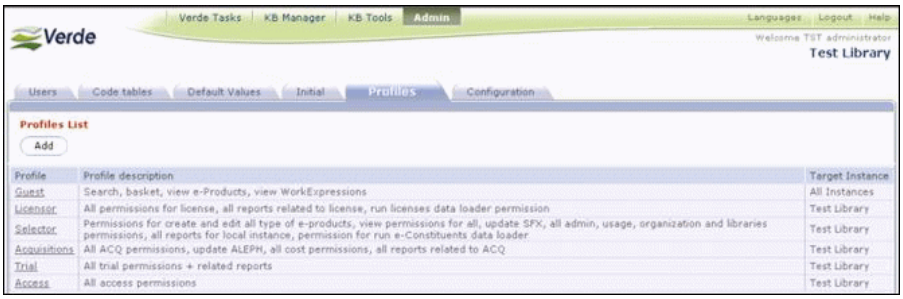

Figure 143: Profiles List

2 In the screen that opens, click the **Delete** button and click **Yes** to confirm deletion. The profile is deleted from the Profiles List and from the Verde database..

43

The Configuration Tab

This section includes:

- **About the Configuration Tab** on page **433**
- **Configuring External Services** on page **433**
- **Configuring the e-Product Summary** on page **436**

About the Configuration Tab

The **Configuration** tab in the Admin module enables you to configure parameters for external services used by Verde, as well as the way in which the e-product Summary is displayed.

Configuring External Services

You can configure parameters for the external applications with which Verde communicates and for the services used by Verde to communicate with these applications. Verde can interoperate with the following external applications: SFX, ALEPH, and Voyager.

To configure parameters for external services:

1 In the left menu of the Admin module's **Configuration** tab, click **External Services**.

2 Click **Add New Service**. A wizard opens, displaying the following screen.

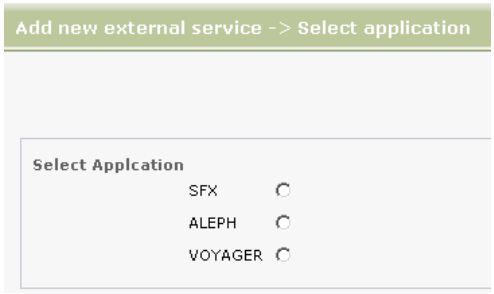

Figure 144: Select Application

3 Select the application for which you want to configure parameters and click **Next**.

4 In the following step of the wizard, select the application services for which you want to configure parameters and click **Next**. By default, all services are selected. For information on the available SFX services, see **Verde-SFX Interoperability** on page **476**.

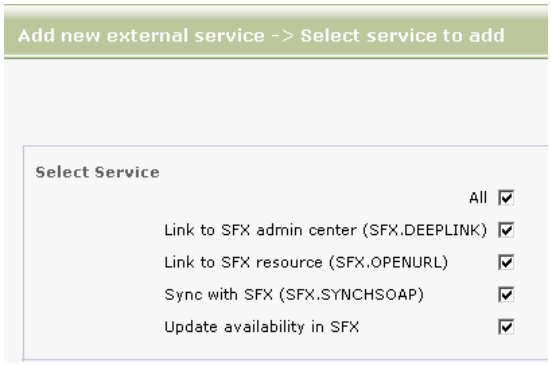
Add new external service -> Select service to add
Select Service
All
Link to SFX admin center (SFX.DEEPLINK)
Link to SFX resource (SFX.OPENURL)
Sync with SFX (SFX.SYNCHSOAP)
Update availability in SFX

Figure 145: Select Service

Note: Only one service is available if you selected the ALEPH or Voyager application.

5 In the following screen, enter the server name, port, and library for the application service(s) you previously selected. The values for these fields

should be identical for all the SFX services communicating with your Verde instance.

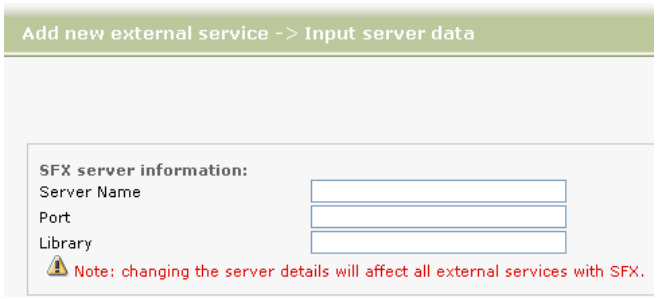
Add new external service -> Input server data
SFX server information:
Server Name
Port
Library
Note: changing the server details will affect all external services with SFX.

Figure 146: Input Server Data (SFX)

Note: If SFX services are already defined for your Verde instance, the fields in this screen will be pre-populated with previously defined values. If you edit these values, the updated values are applied to both the new SFX services you selected as well as the previously defined services.

Click **Next**.

6 In the following screen, enter a user name and data for each previously selected service. This data is specific for each service.

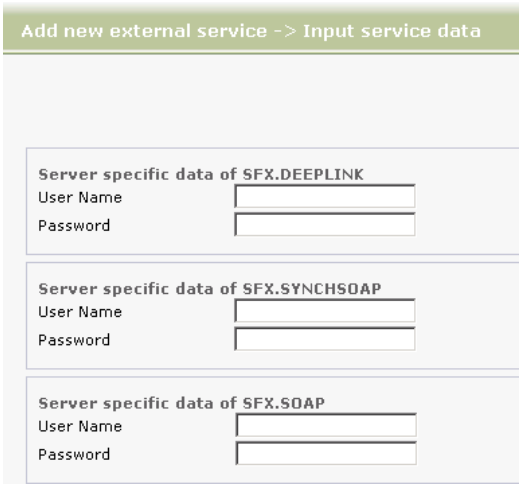

Figure 147: Input Service Data (SFX)

Note: The Link to SFX resource service does not require these parameters.

7 Click **Finish**. The wizard closes and the information you entered for each application and service is displayed in tables. Each table can be collapsed or expanded.

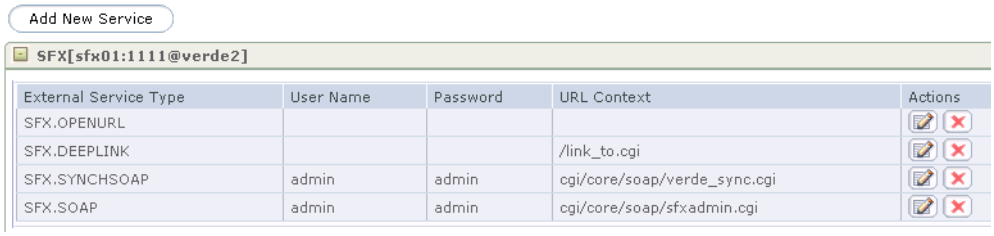

Figure 148: List of Services for an Application

The server and port values are displayed to the right of the application name. The user name, password, and URL context values for each service are displayed in the table under the application with which the service is associated. The displayed information can be edited or deleted.

Configuring the e-Product Summary

You can configure the following for the e-product Summary screen:

- the sections to be displayed in the e-product Summary screen
- the fields to be displayed in each section
- the display order of the sections
- the display order of fields in each section
- whether a section is expanded or collapsed by default

To configure the e-product Summary:

In the left menu of the Admin module's **Configuration** tab, click **Summary**. The following screen is displayed.

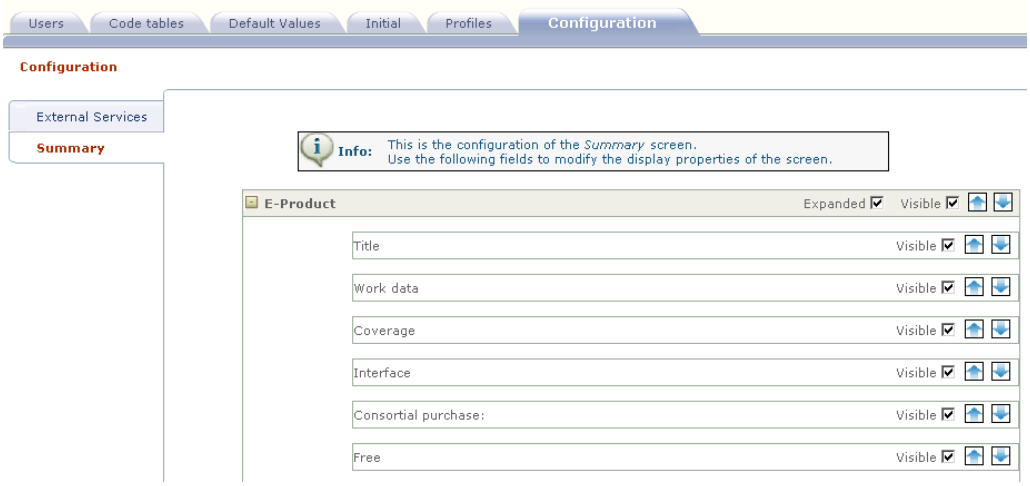

Figure 149: Configuration Tab - e-Product Summary Configuration

By default, all sections and fields are selected and the e-Product section is expanded.

- To prevent a section from being displayed in the e-product Summary screen, clear in the **Visible** check box in the section's title bar. For example, if you clear the **Visible** check box in the **Trial** section's title bar, as illustrated below, the Trial section will not be displayed in the e-product Summary screen.

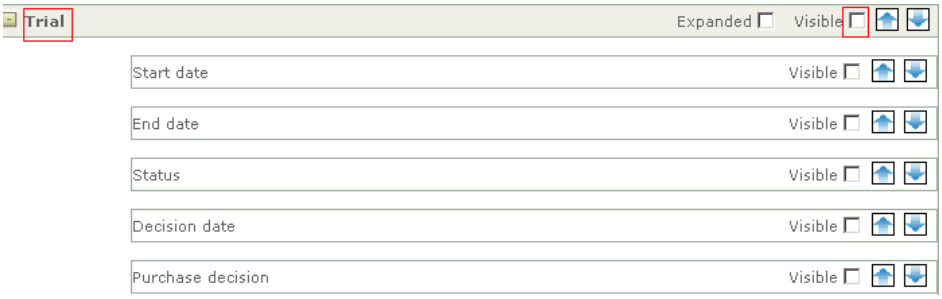

Figure 150: Trial Section – Clearing the Visible Check Box

- To prevent a field from being displayed in the e-product Summary screen, clear the **Visible** check box at the end of the field's row. For example, if you clear the **Software requirements public** and **View Admin settings** fields, these fields will not be displayed in the e-product Summary screen.

- To change the display order of a section in the e-product Summary screen, click the **Up** or **Down** arrow in the section title bar.

Figure 151: Up and Down Arrows – Section Title Bar

- To change the display order of a field within a section, click the **Up** or **Down** arrow at the end of the field's row. For example, if you click the **Interface** field's **Up** arrow, as illustrated below, this field will be displayed after the **Work data** field and before the **Coverage** field in the e-product Summary screen.

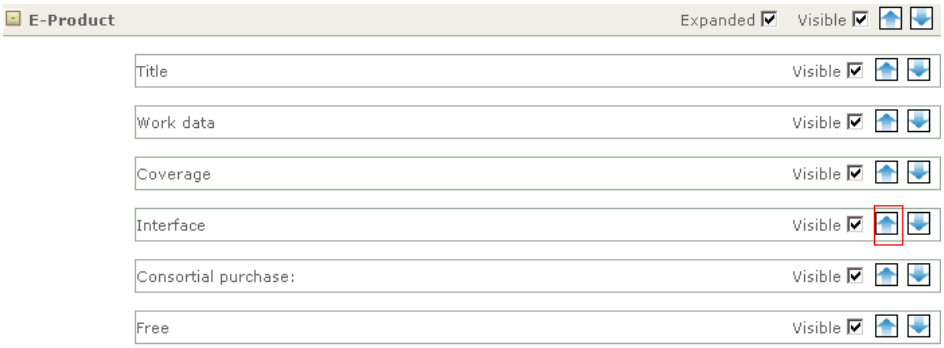

Figure 152: Up and Down Arrows – Fields

- To display a section as expanded in the e-product Summary screen, select the **Expanded** check box in the section's title bar. To collapse a section, clear this check box. By default, only the e-Product section is displayed as expanded.

Part 6

Shared Consortium Environments

Part 6 contains the following:

- Section **44: The Shared Consortium Environment** on page **441**
- Section **45: Setting Up a Shared Consortium Environment** on page **443**
- Section **46: Working in a Shared Consortium Environment** on page **453**
- Section **47: Search, Display,and Navigation in a Shared Consortium Environment** on page **459**
- Section **48: Merged View** on page **469**

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The Shared Consortium Environment

This section includes:

- **Definition of Terms** on page **441**

A shared consortium environment is an environment in which multiple instances exist. One of these instances serves as the central instance, while the other instances are member instances. In Verde, the shared consortium environment provides tools to support the management of shared and non-shared resources, as well as enhanced cross-consortium search and filter capabilities, cross-consortium navigation, merged displays, and cross-consortium reporting.

Definition of Terms

Multi-instance – a Verde installation that works in a mode that supports interaction between the instances.

Shared consortium environment (shared model) – the multi-instance model that includes a central instance and cooperation between the member instances.

Non-shared model – the multi-instance model that may support cooperation, but does not support sharing between instances.

Central instance – sometimes referred to as the shared instance. This is the instance that is responsible for managing shared resources. The central instance cannot be a member instance.

Member instance – an instance that is part of the consortium, but is not the central instance. Sometimes referred to as a local instance.

Institute – a subdivision of an instance. In the central instance, each local instance should be defined as an institute (its Related Instance value should be defined as **member instance**).

Local Institute – a particular library within a member instance. In the central instance, each local institute can be defined using the Related Institute field.

Local institutes are relevant only for the asymmetrical synchronization model. For details, see **Synchronizing Updates in Consortia** on page **483**.

Consortium level – sometimes referred to as tier. Three consortium levels are supported: managed for all, managed for some, and managed locally.

Active instance – the instance you are logged into.

Local – an e-product is local if it has a member instance-level e-product status or selection status, or an attribute record (license, acquisitions, trial, etc.).

Search KB – flag for searching. If selected, non-local records from the KnowledgeBase are included in the search results.

Managed for – If an e-product is managed for an instance, the center controls the e-product but makes it available to the local instance.

Managed by – If an e-product is managed by an instance, it is controlled in the member instance.

Active – an e-product is active if it has an e-status and if the current date is larger than the **activation from** date and less than the **expiration** date.

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Setting Up a Shared Consortium Environment

This section includes:

- **Setting Up the System Configuration Parameters** on page **443**
- **Configuring Institutes** on page **444**
- **Selecting Instance Abbreviations** on page **446**
- **Working with Users** on page **447**

A shared consortium environment is always a multi-instance environment. Of the multiple instances, one and only one instance can be designated as the central instance (or center). All other instances are consortium members. The center cannot be a member. Member instances that have access to shared resources must be configured as institutes of the central instance. This enables the center to manage e-products for the member instances.

Setting Up the System Configuration Parameters

The file `global.properties` contains the following two system configuration parameters that must be configured if you are working in a shared consortium environment:

- `verde.share.mode` – defines the mode in which you are working. Possible values are:
  - `separate` – enables multi-instance searching, but no cooperative acquisitions, activation, or licensing
  - `share` – the model described in this section
- `shared.instance` – defines the central instance

The following is an example configuration:

```
<category name="system">
  <property name="verde.share.mode" value="SHARE" />
  <property name="shared.instance" value="INST1" />
  <property name="global.properties" value="/exlibris/verde/ v2_1/
verde/home/profile/global.properties"/>
  <property name="verde.initialization" value="true"/>
</category>
```

For more information on customizing system configuration parameters, contact your Implementation or Support representative.

Configuring Institutes

Verde supports the following two types of consortium members:

- Full members – also referred to simply as members. Full members have Verde instances of their own in which they manage local resources.
- Guest members – members for which the center manages resources. Guest members do not have Verde instances of their own.

Both types of members—full and guest—must be configured as libraries of type **institute.**

To configure a member instance to work in a shared consortium environment:

1. Log in to the central instance and select **Managing > Libraries**. The Details tab opens, enabling you to create a new library record.
2. In the **Library code** field, enter a unique library code. The library code cannot be the same as the member instance code, or as any other library or organization code within the same Verde installation.

Note: The Verde Implementation team recommends using the following conventions in defining a library code:

For full members, add **_i** to the instance code. For example, if the instance code is **UMCB**, the library code would be **UMCB_i**.

For guest members, add **_g** to the instance code. For example, if the instance code is **UMCB**, the library code would be **UMCB_g**.

---

3. In the **Library name** field, enter the name you want to assign the library you are creating.

4 (Optional) Enter up to three alternative names for this library in the **Alternate name** fields.

5 Under **Guest member**, select **Yes** if you are creating a record for a guest member or **No** if you are creating a record for a full member.

6 If you selected **No** in the previous step, from the **Related instance** drop-down list, select the member instance with which you want to associate the library you are creating.

7 (Optional) If you selected **No** in step 5 and are working with the asymmetrical synchronization model (for details, see **Synchronizing Updates in Consortia** on page 483), from the **Related institute** drop-down list, select the local institute with which you want the center to communicate.

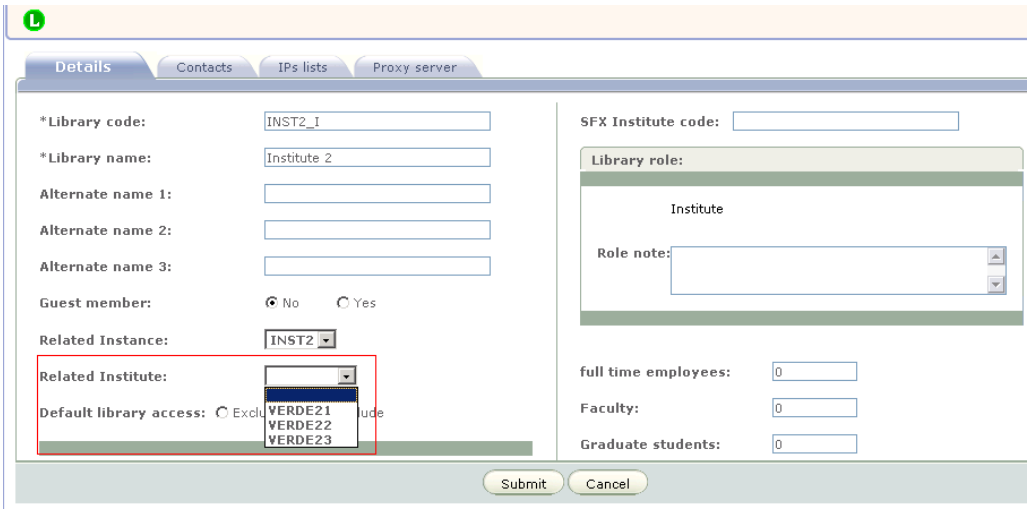

Figure 153: Related Institute

Note: The system does not allow you create two library records with the same related instance and related institute value. If you attempt to create such a record, you will receive an error message.

8 Complete the rest of the library record as described in **Library Details** on page 170.

9 Repeat steps 1-8 for each member instance in your shared consortium environment.

In addition, if there are multiple local institutes within your system's member instances and you want the center to manage each of these institutes, you should define a library record for each institute. For example, if there are three local institutes (VERDE21, VERDE22, and VERDE23) in member instance INST2, you would create three separate library records. In each record, you

would select **INST2** as the **Related instance**, but the **Related institute** would differ for each record.

Note: If you create one library representing a specific institute and another library representing the library's member instance, the library representing the member instance includes all the other local institutes within the member instance. For example, if you create one library with a **Related instance** value of **INST2** and a **Related institute** value of **VERDE21** and another library with a **Related instance** value of **INST2** and no value for the **Related institute** field, the latter library would include all the other local institutes within the INST2 member instance (such as VERDE22 and VERDE23, to continue with example provided above).

Selecting Instance Abbreviations

Each local instance and the center instance can select an abbreviation or acronym in addition to the instance name. The instance abbreviation will display in the holdings column of the result screen and from the pull down menus that display as part of the multi-instance searching and navigation. The instance abbreviation is stored in the instance's library record. Note that if the instance abbreviation field is blank, the system will take the first five characters of the instance name.

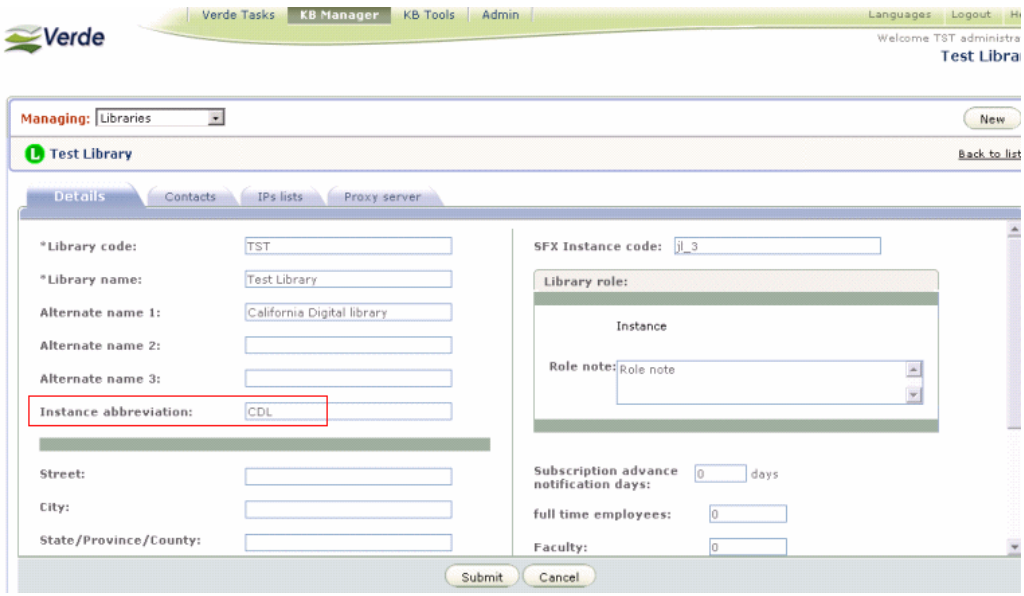

Figure 154: Instance Abbreviation

Working with Users

A user's home instance is the instance in which the user was created and in which the user is displayed. When a user logs in to Verde, the user's home instance is displayed by default. In addition, a user is displayed only in its home instance, so that only administrators in the user's home instance can edit and assign privileges and profiles to the user.

Privileges in the user's home instance can be assigned either via profiles, which are sets of privileges, or directly, using the Privilege tab. Privileges for all other instances can be assigned using profiles only. (Use the **Add Profile** function on the user record to assign profiles to a user. Note the filter by instance option).

Users in a consortium environment can be assigned profiles for one or more instances. In fact, multi-instance searching will work only if users are assigned searching privileges in multiple instances. In the current version of Verde, users in member instances must be assigned profiles that enable them to search the center.

Working in a consortium environment requires cooperation between instances. To enable users from instance A to perform actions in instance B, the administrator of instance B must create an appropriate profile for instance A. The administrator of instance A must then assign this profile to users from instance A.

To create a profile for another instance in a multi-instance environment:

1 In the **Admin** module, click the **Profiles** tab. The Profiles List is displayed.

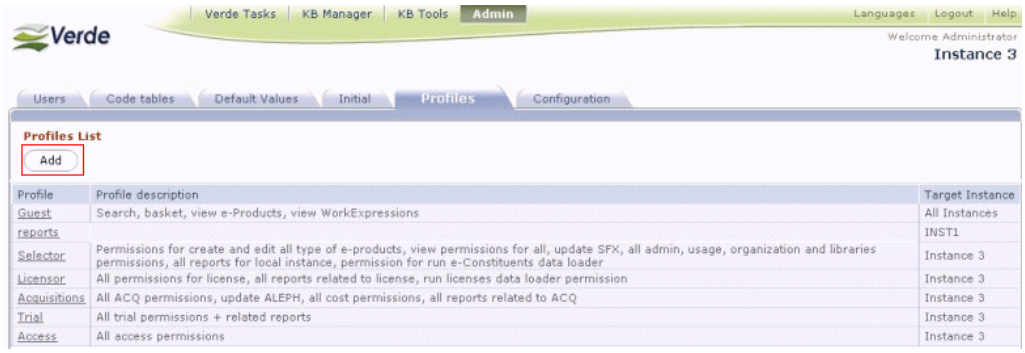

Figure 155: Add Profile

2 Click the **Add** button**.** The profile details screen, consisting of two tabbed sections, **Profiles** and **Privileges**, is displayed.

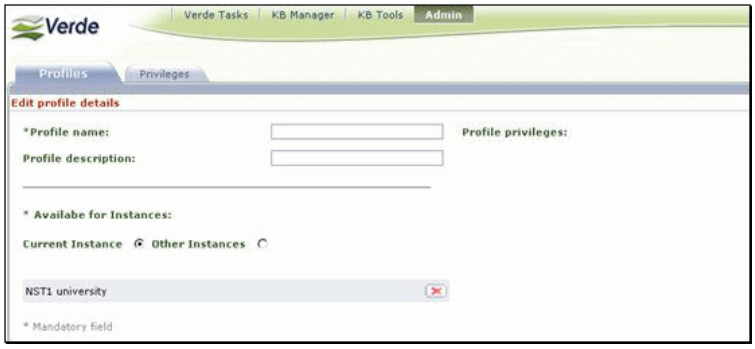

Figure 156: Profile Details Screen

3 Enter the name you want to assign the profile, as well as a description of the profile. Note that the **Profile name** field is a required field.

4 Under **Available for Instances**, select **Other instances**. The screen expands, enabling you to select **All instances**, or specific instances from the **List of instances** drop-down list.

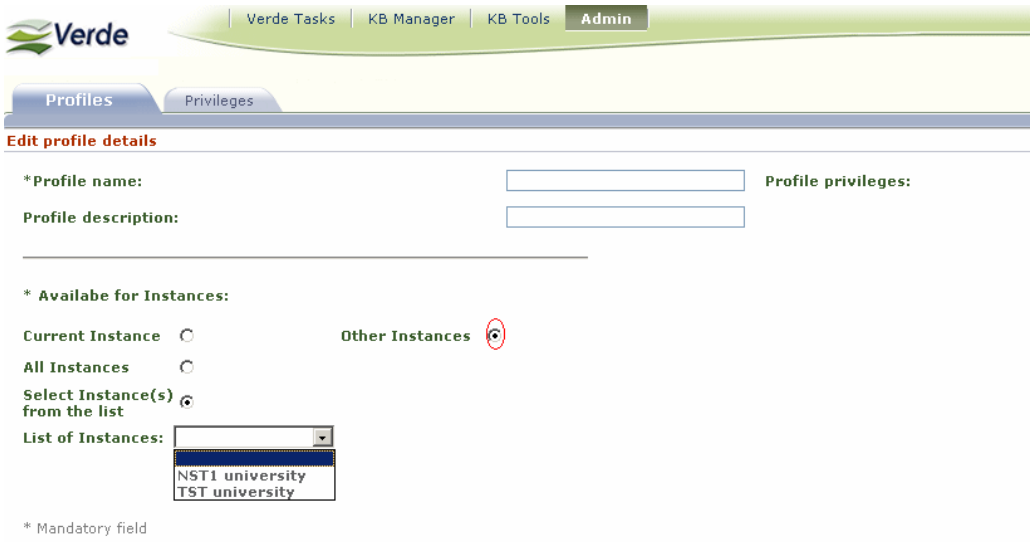

Figure 157: Profile Details for Multi-Instance Installations

5 Select one or more instances (using the CTRL key) from the **List of instances** drop-down list.

6 Click the **Privileges** tab, select the privileges relevant to the profile you are defining, and click **Submit**. The **Profiles** tab is displayed, enabling you to view a summary of the permissions that you have assigned to the profile.

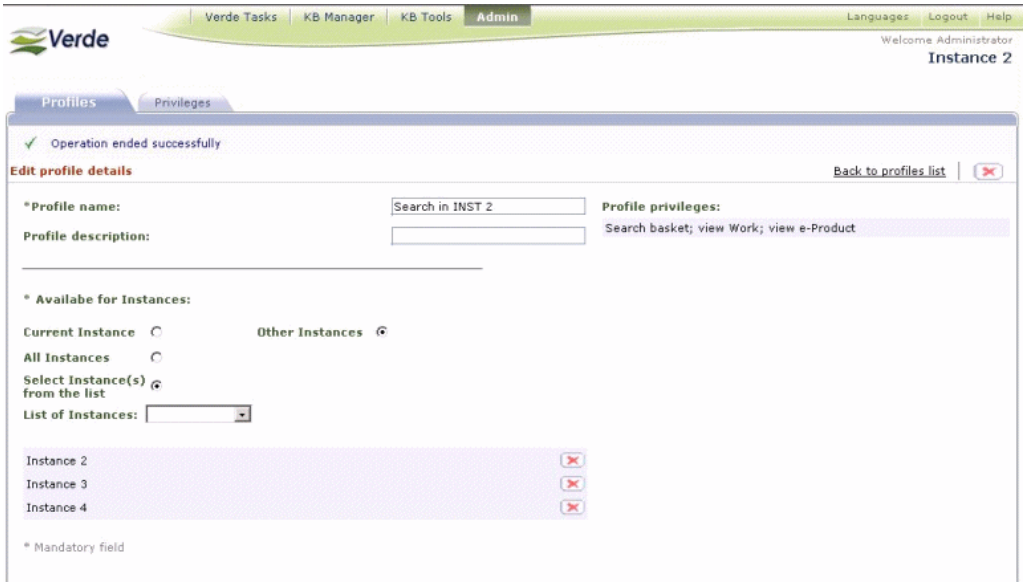

Figure 158: Profile Privileges for Defined Profile

Once an administrator of an instance selected above assigns the created profile to specific users in this instance, these users will be able to perform the actions governed by the privileges specified within the defined profile.

Setting Up Guest Profiles

A guest profile is a predefined profile that enables the search of, and navigation to, other instances. In addition to creating and assigning profiles for regular users, administrators of each local instance and of the shared instance in a multi-instance environment should create guest profiles for, and assign these profiles to, guest users.

To add a guest profile and assign it to a guest user:

1 Log in as an administrator.

2 In the Admin module, click the **Users** tab.

3 Click the login name of the user to which you want to assign the profile. The user's details are displayed.

4 Click **Add profile**. The Select profile for user screen is displayed.

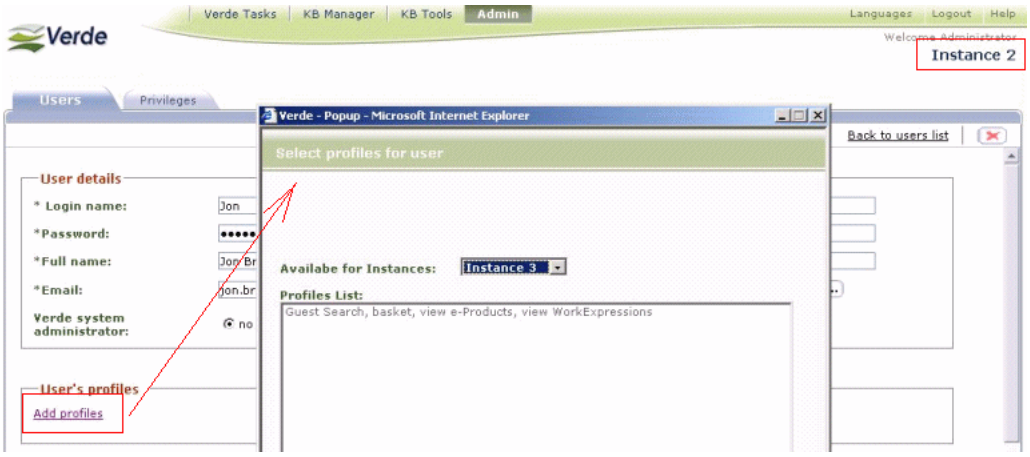

Figure 159: . Add Guest Profile

5 From the **Available for instances** drop-down list, select the instance you want the selected user to be able to search and navigate. This drop-down list contains a list of all the instances that exist in your Verde installation and have profiles defined for your instance.

6 Select **Guest profile** and click **Submit**.

In the example above, the administrator of Instance 2 assigned the selected user a guest profile for Instance 3. After this guest profile is assigned to the selected user, Instance 3 will appear in the list of instances available for this user to search. In addition, this user will be able to navigate to Instance 3 from Instance 2.

Copy/Paste Attribute Profiles

It is possible to copy and paste license, access, or admin attributes from one instance to another within a multi-instance environment. To enable this functionality, the administrator must create a profile that includes the create/edit privilege for the appropriate attribute.

For information about creating such a profile, **Setting Up Guest Profiles** on page **449**.

For information about the copy/paste functionality, see **Copying and Pasting e-Product Data** on page **57**.

Multi-Instance Report Profiles

Verde enables you to generate multi-instance reports for all existing reports in a consortium environment. Multi-instance reports include data from all selected instances, although the report summary and output are available only in the instance in which the report is generated.

A multi-instance report can be generated only by a user that is assigned a profile with permissions to run reports in another instance.

In the example below, the administrator of Instance 2 created a profile that enables users in Instance 3, Instance 4, and INST1 that are a part of the consortium to generate a general e-product report based on data from Instance 2.

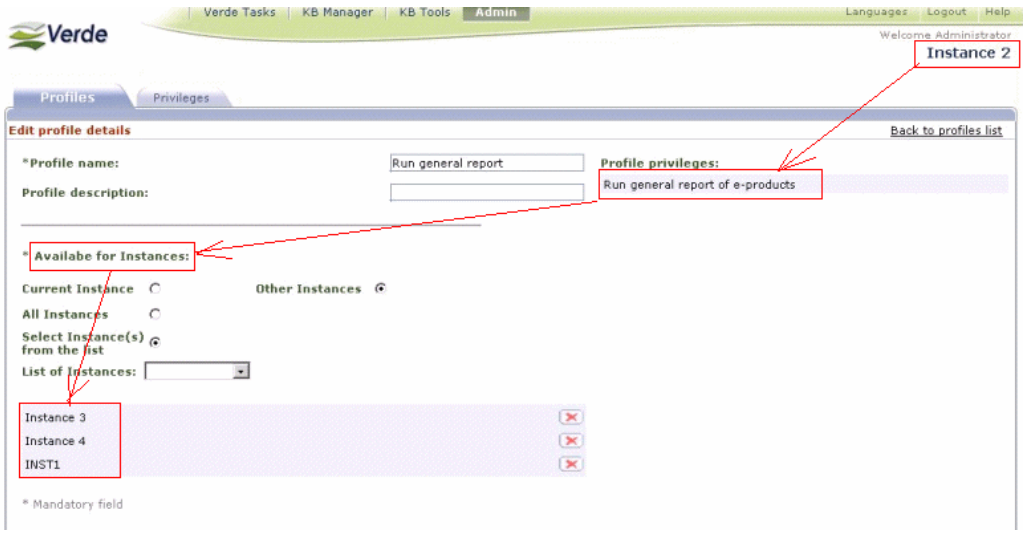

Figure 160: Multi-Instance General Report Profile

Note: All Verde report outputs can be customized by an instance. For more information, see **Customized Report Outputs** on page **371**.

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Working in a Shared Consortium Environment

This section includes:

- **Managing Resources Centrally** on page **453**
- **Managing Resources Locally** on page **455**
- **Propagating Locally Created Records** on page **456**

Resources in a shared consortium environment fall into one of two categories: **managed centrally** or **managed locally**. Resources that are managed centrally are activated in the center for one or more member instances. Resources that are managed locally are activated, acquired, and licensed by the member instance in the member instance.

The central instance is responsible for the management of shared resources, that is, resources that are active for one or more member instances. The management of shared resources involves activating the resources for one or more member instances as well as managing acquisitions and/or licensing of the same resources. Member instances are responsible for managing the local data that is maintained for shared resources as well as managing all aspects of local resources.

Managing Resources Centrally

Resources that are managed centrally are activated and controlled in the center for member instances. This means that data that resides in the e-product record—namely, status, selection status, activation from date, expiration date, coverage, embargo, and availability (among other fields)—is all set in the center and applies to all members that receive it from the center. If an e-product is managed in the center for a member instance, then the e-product from the center will be retrieved when searching the member instance. The e-product will also display from the member instance.

e-Product Libraries

The e-product **Libraries** tab is used to designate for which consortium members the e-product is managed. Each member instance must be configured as a library of type **institute** in the central instance. Then it will display in the Libraries tab of the e-product. When an e-product is "localized"—that is, either an e-status or a selection status is assigned, the Libraries tab must be edited by the user or it will default to the library default behavior that is set in the library record. To make the e-product available to a member, select the corresponding library from the list of libraries in the e-product Libraries tab. In each library record, there is a flag to indicate if the default is to make this library active or inactive. Selecting **all** will make the e-product available to all members. Note that at least one library must be selected. If no default behavior is set and the e-product library is not edited, then the system will automatically assign the value **all**, meaning that the e-product is available to all libraries.

The e-product libraries must be set in e-package and e-standalone records. e-Constituent records can either inherit the library settings from their package record, or they can have their own settings. e-Constituents should have independent library settings only if their library settings differ from that of the package. To create e-constituent-level library settings, click the **Add** button in the e-constituent record's **Libraries** tab. Select the appropriate libraries from the library list and then click **Submit**. Note that in e-constituent records, the Libraries tab is read-only until you click the Add button.

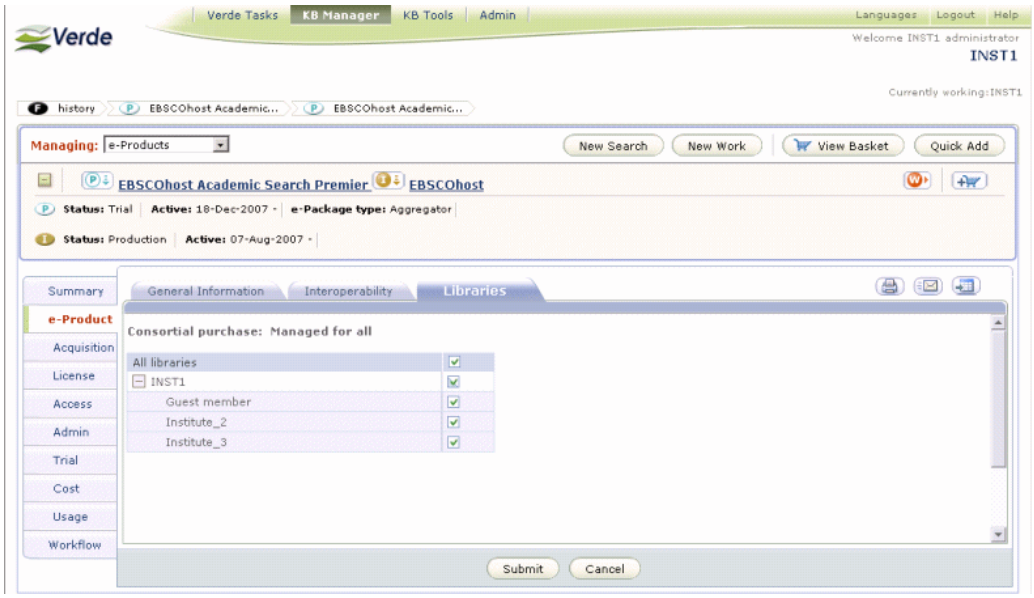


Figure 161: e-Product Libraries

Consortium Level

The consortium level field displays in shared consortium environments only. It displays from the third tab of the e-product, the e-product **Libraries** tab. The consortium level field is set automatically by the system, based on the library settings of the e-product. If the e-product is managed centrally and all libraries are selected, the consortium level is **Managed for all**. If the e-product is managed centrally and one or more but not all libraries are selected, the consortium level is **Managed for some**. The consortium level displays in the Libraries tab and in the result screen.

The consortium level is always managed at the same level as the e-product library. This means that if an e-constituent has its own library settings, it will also have its own consortium level. Otherwise, it will inherit both the libraries and the consortium level from its package.

e-Product Attributes

When an e-product is managed centrally, the activity status, coverage, and availability must be set in the central instance for all member instances. However, other data can be managed centrally or locally, depending on the local practice. In many consortia, trials, acquisitions, and licensing are performed centrally, but access, usage, and cost are maintained by the local instances.

Managing Resources Locally

Resources that are managed locally are managed in the member instance for the member instance. When resources are managed locally, the e-product and all of its attributes are updated and maintained in the member instance alone. An e-product can be managed for a member by the center and managed by the member for itself at the same time. This can occur when a member purchases additional titles from a package or when they purchase additional coverage.

e-Product Libraries

Member instances can have library sub-divisions. The e-product library data can be maintained for resources that are managed locally by the member instance. e-Product libraries cannot be set in the member instance for resources that are managed in the center.

Consortium Level

The consortium level displays in the third tab of the e-product record, the e-product **Libraries** tab. The consortium level is set automatically by the system. For records that are managed by the member instance, the consortium level is automatically set to **Managed locally**. The consortium level field is managed on the same level as the e-product libraries, so if an e-constituent inherits libraries from its package, it will also inherit the consortium level from its package.

Propagating Locally Created Records

Any e-product or work record that is part of the Verde KnowledgeBase will be included in the center as well as in all member instances. These records have e-product and work record codes that are common to the record wherever it is found. These codes facilitate navigation and linking between instances. Records, especially e-product records, that are not part of the KnowledgeBase will not necessarily have common identifiers. To facilitate navigation between records in a multi-instance environment and to allow the management of the e-product and its attributes to be distributed across multiple instances, Verde automatically propagates locally created e-product and work records from the instance in which they are created to all other member instances. This means that if a work record and e-package is created in the center, it will be copied to each of the member instances. The same is true for the member instances; if a work or e-product record is created in the member instance, it is copied to all other member instances and to the center. The source record triggers creation and update to records in other instances.

Locally Created Work Records

When a work record is copied from one instance to another, all of the non-local fields are copied. Local fields are stored in the MARCXML record in fields that begin with a 9—for example, 901, 902, and so forth. Local fields display in the user interface with **Local** as part of the field name. Updates to any of the non-local fields in the work record will be passed along to all copies of the record. However, updates to local fields are not.

Locally Created e-Product Records

When an e-product record is copied from one instance to another, only the global fields are copied. Any update to a global field in the source record will be distributed to e-product records in other instances. Neither the data contained in the non-global fields, nor updates to non-global fields, will be distributed across instances.

The following is a list of the global fields:

- e-product type
- e-package type
- e-product code
- work code (link to work record)
- up code (link to higher level record, either package or interface)
- creation date
- created by
- jkey

Note: Global fields are not editable in instances other than the instance in which the record was created.

Search, Display,and Navigation in a Shared Consortium Environment

This section includes:

- **Search and Display in the Center** on page **459**
- **Search and Display in Member Instances** on page **461**
- **Search Locally Created e-Product Records** on page **464**
- **Navigation** on page **466**

In a shared consortium environment, users can search across any combination of instances to which they have access, using a combination of filters. The search interfaces and filters available from the center differ from those available to members.

Search and Display in the Center

When searching from the center, you can filter searches by the following:

- managed for all
- managed for some
- managed for a specific institute
- managed by a specific member instance
- include KnowledgeBase

By selecting the appropriate combination of fields, you can retrieve the following:

- all e-products that are managed for all
- all e-products that are managed for some
- all e-products that are available for a particular instance, regardless of who manages them

- all e-products that are managed by a particular instance
- all e-products that are managed by or for a combination of instances

If you do not right-click **Find**, the search will be performed using the same filters as the previous search. If this is your first search in the current session, it will be performed in the active instance—in this case, the center. The instance filter is sticky. That is, after you select a set of instances to search, all subsequent searches will be performed on this set of instances until you explicitly set new filters. If you select the check box **Search KB**, KnowledgeBase records that are not localized will be included in the search. **Search KB** can be selected only in conjunction with other instances. It cannot be used alone.

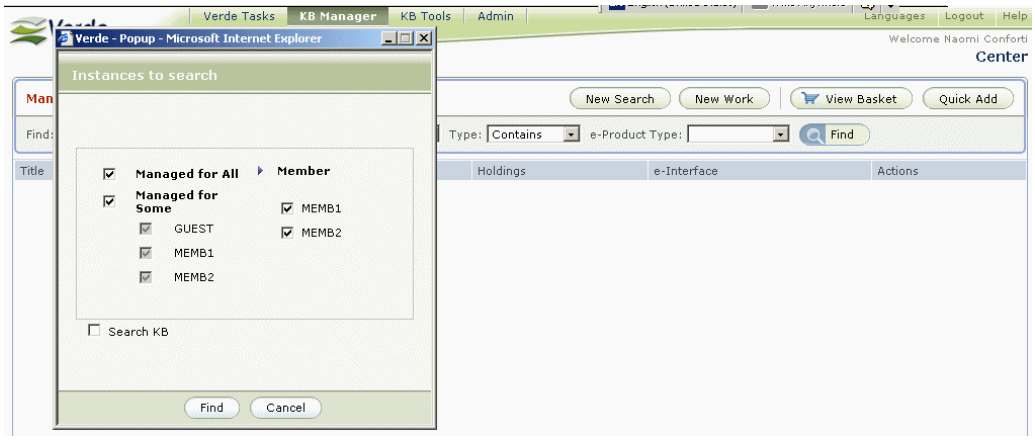


Figure 162: Search – Center

Display

There are three components to the display:

- the search result summary
- the navigation menu that displays when right clicking a button or e-product name
- the Holdings column that displays the instance name and the e-product and e-product selection status in the instance

The search filters largely control what is included in, or excluded from, each of the components. If an instance was included in the search, then it will also display in the search result summary, be included in the navigation menu, and display in the Holdings column. If the instance was not included in the search, it will not be included in any of the above. The only exception to this rule is the

active instance (in this case the center), which is always included in the navigation menu and in the Holdings column.

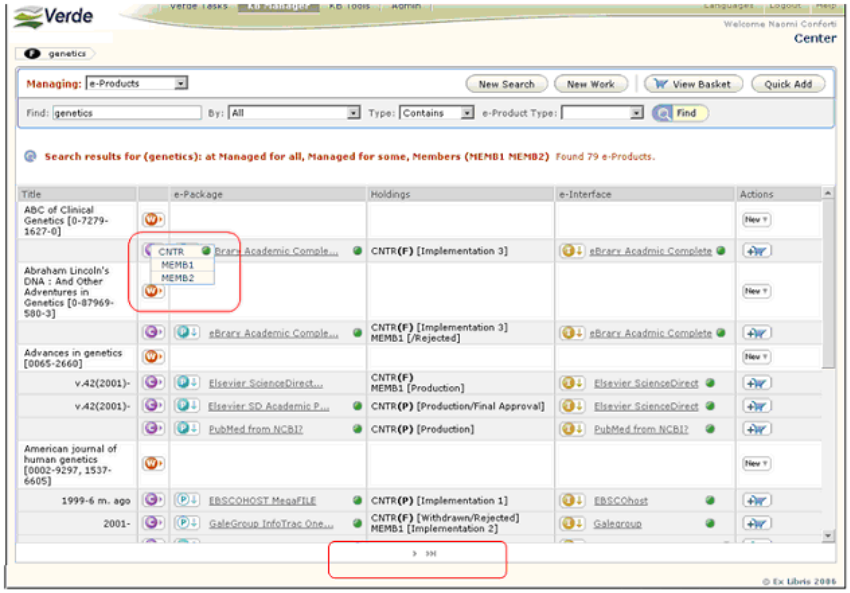


Figure 163: Display – Center

In a consortium environment, the Verde result screen includes a Holdings column, which does not display in non-consortium installations. The Holdings column, the fourth from the left, displays the instance abbreviations of instances that were included in the search and in which the e-product has an e-status or selection status. The status displays next to the instance name in parentheses. For e-products that are active in the center, the consortium level displays next to the instance abbreviation—(F) for **managed for all** and (P) for **managed for some**.

Search and Display in Member Instances

When searching in member instances, you can filter searches by the following:

- active instance
- member instances
- include KnowledgeBase
- managed locally

By selecting the appropriate combination of fields, you can retrieve the following:

- all e-products that are available to (managed for or managed by) one or more member instances

- all e-products that are managed by one or more member instances
- all e-products that are managed for or by an instance or part of the KnowledgeBase

Note: To enable the search and navigation functionality, you must set your browser to allow pop-ups.

To open the Search window, right-click the **Find** button. If you do not right-click **Find**, the search will be performed using the same filters as the previous search. If this is the first search in the current session, it will be performed in an active instance only. If you select the check box **Include KB**, KnowledgeBase records that are not localized will be included in the search. **Include KB** can be selected only in conjunction with another instance. It cannot be used alone. If you select the **Managed locally** check box, records that are managed by the center are filtered out for the instances being searched.

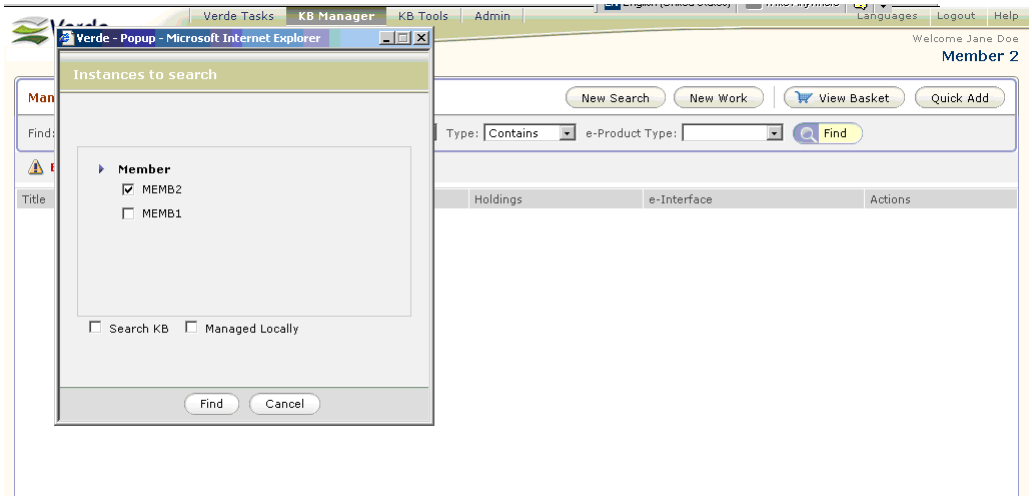


Figure 164: Search – Member Instances

Display

The display behavior in the member instances is similar to that of the center. There is a column for holdings and this column displays the instance name plus the e-product and selection status of the e-product in the instance. Instances that are included in the search display in the Holdings column only if the e-product has a status or selection status in the instance. The active instance is always included in the Holdings column. The center is never included explicitly in the Holdings column. If an e-product is managed locally by one of the instances searched, the instance name appears with a (L). If an e-product is managed in the center for an instance that is included in the search, then the instance name appears with a (C)—for example TST(C) means that the e-product is managed for TST in the center. Searches that are performed with

the filter managed locally will not include e-products that are managed centrally.

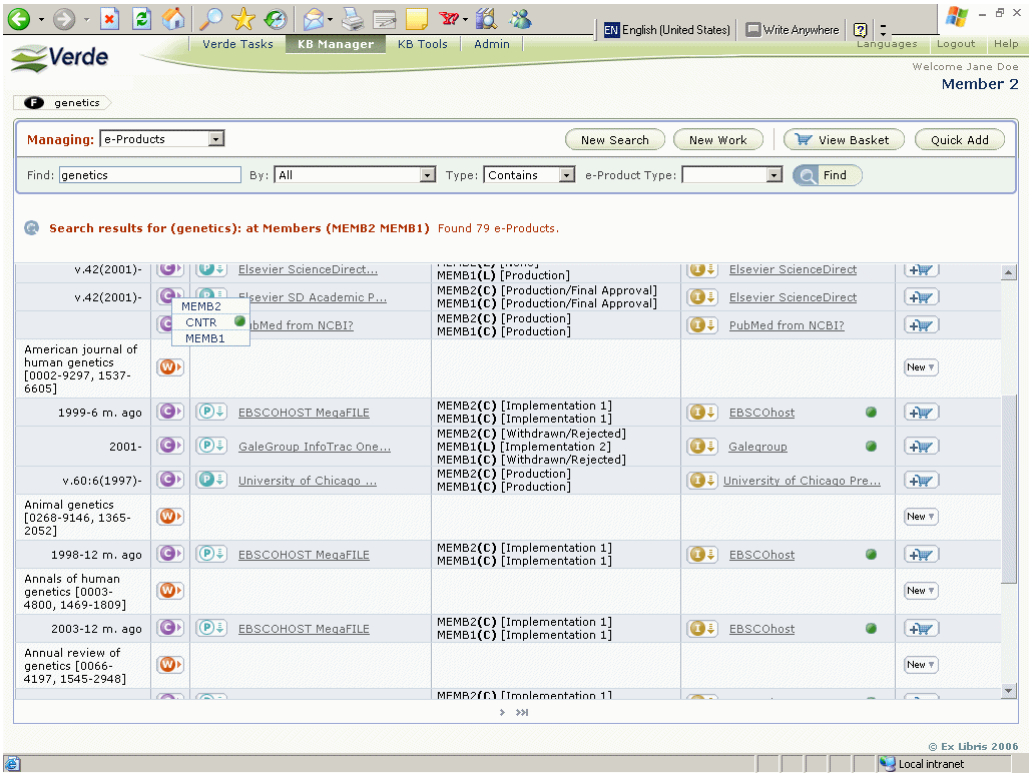


Figure 165: Display – Member Instances

Search Locally Created e-Product Records

e-Products that were created in one of the member instances of the consortium can be retrieved by searching in another instance if one of the following two conditions is met:

- The instance in which the e-product was created is included in the search
- The **Search KB** check box is selected

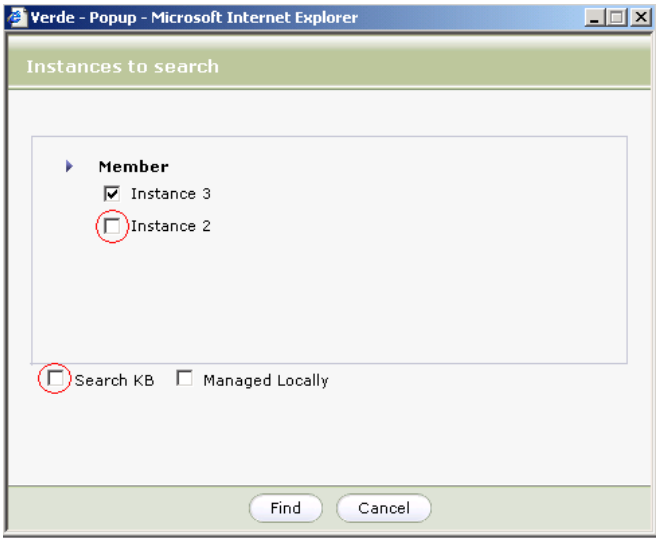


Figure 166: Search Locally Created e-Products in Member Instance

If a user from the central instance would like to retrieve an e-product that was locally created in one of the member instances, the same conditions apply.

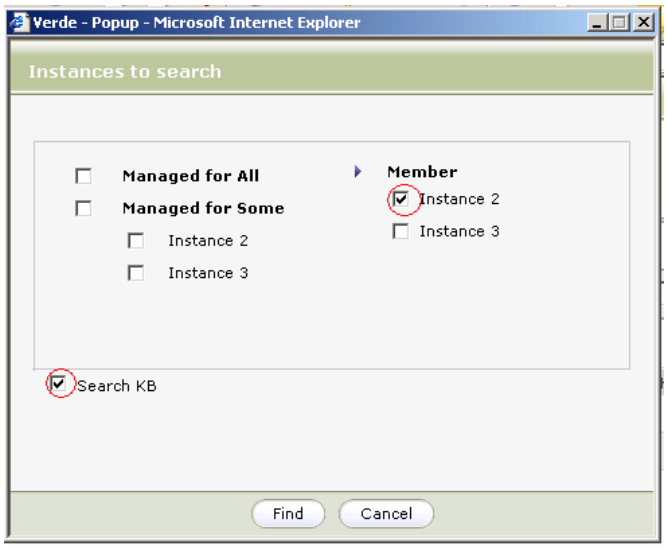


Figure 167: Search Locally Created e-Products in Central Instance

If an e-product was created in the central instance, it can be retrieved in a member instance using the default search parameters.

If the locally created e-product is an e-constituent, it is displayed in the package list of the e-package to which the e-constituent is linked. An e-constituent that is created in one instance is shown in the package list of another instance if the **Display All** option is selected.

For example, an e-constituent entitled **ABC** is created in INST2 and connected to an e-package. If you are in instance INST3 and select the **Display Local** option in the package list, the **ABC** e-constituent is not shown.

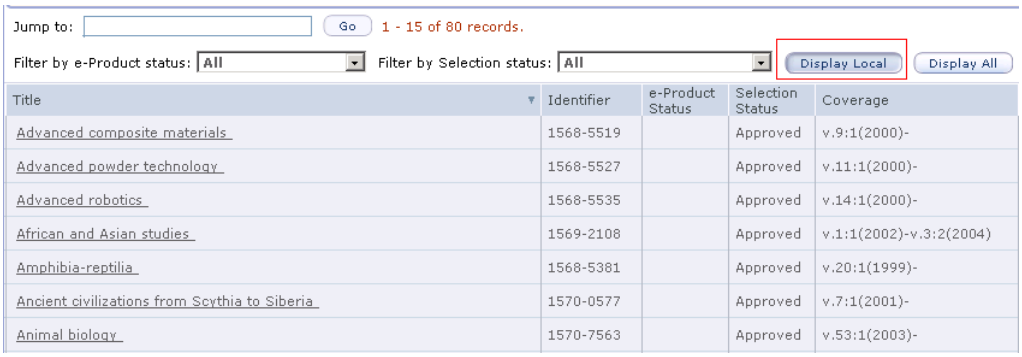


Figure 168: Display Local – Package List

If the **Display All** option is selected, the e-constituent is shown.

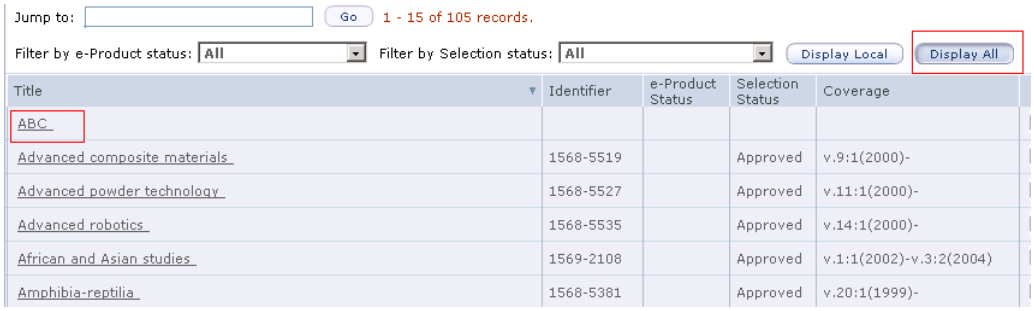


Figure 169: Display All – Package List

If the e-constituent is localized in INST3 (for example, activated), it is shown when the **Display Local** option is selected.

Navigation

To view an e-product or work record, click or right-click the appropriate button or e-product name from the result screen. Clicking a button or e-product name opens the record in the active instance. Right-clicking the button or e-product name displays a list of instances in which the e-product exists. If the e-product is active in the instance, the green active icon will display next to the instance abbreviation in the list. To navigate to the e-product in a different instance, right-click the instance abbreviation. The e-product opens in edit or read-only mode, according to the user's privileges for the instance. All instances included in a search appear in the navigation menu. The active instance displays first and all other instances display in alphabetical order. The center appears in the navigation menu unless the search uses the **Managed locally** filter.

When you navigate to a record in a different instance, a pop-up window informs you that the instance you are working in has changed. The window can be de-activated for the remainder of the session.

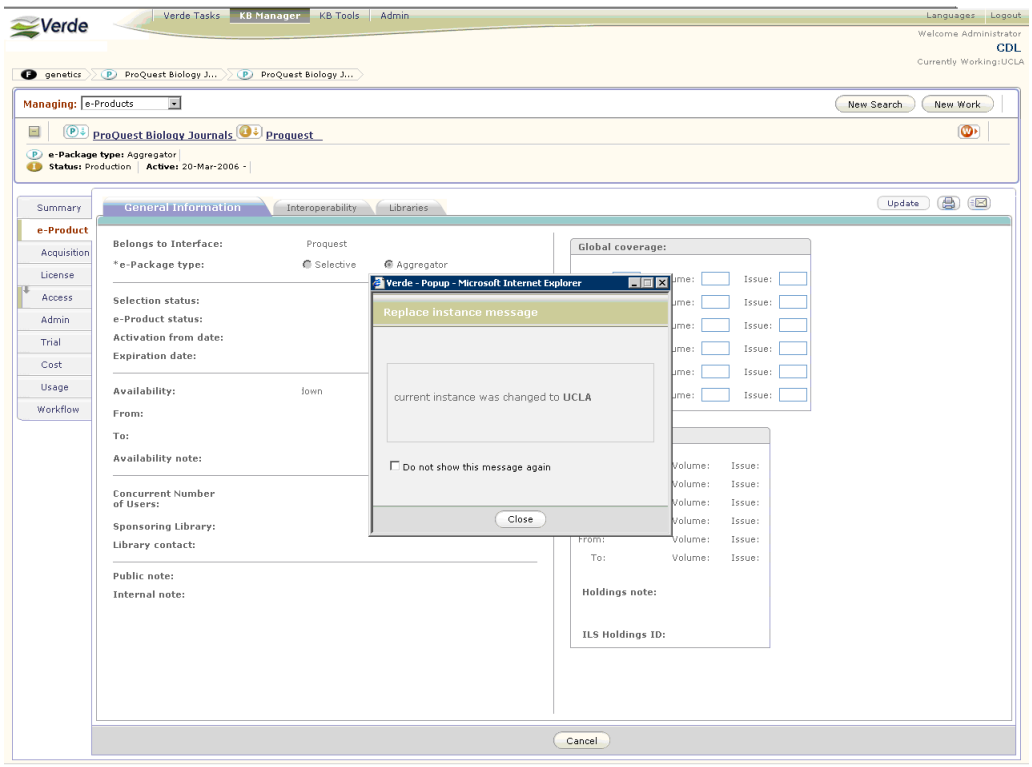


Figure 170: Navigation

In addition to the pop-up alert, the Verde banner changes so that both the name of the default instance and the record's instance display.

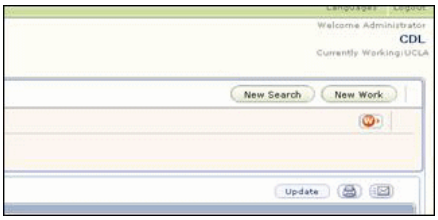


Figure 171: Name of Default Instance and Record's Instance

If a user has write permission for records in instances other than the default instance, when changes are submitted, a pop-up will inform the user that changes are being made to records that are not in the user's default instance. This message can be disabled.

48

Merged View

This section includes:

- **e-Product Brief Summary** on page **469**
- **e-Product Summary Tab** on page **470**
- **Viewing Merged Data in the e-Package and e-Interface Lists** on page **471**

Within a shared consortia environment, there are e-product attributes, such as acquisitions and license that are managed centrally for all members. However, there are e-product attributes, such as usage and access that are managed locally. In order to facilitate this, it is important to enable users to view data from the e-product in the center while working on the local attributes. The merged data is shown in two areas: in the e-product brief summary and in the Summary tab. In addition, merged data can be viewed in the e-product and e-interface lists.

e-Product Brief Summary

The e-product brief summary is available to you in member instances at all times, regardless of your user privileges. The summary line is displayed only if an e-product is managed in the center for the instance itself.

A single line has been added to the brief summary. It includes the following fields from the e-product in the center:

- e-Product status
- Selection status
- Active from date + Expiration date – if present
- Coverage text (coverage + embargo) – if present
- Availability – if present
- Acquisition status

- License status

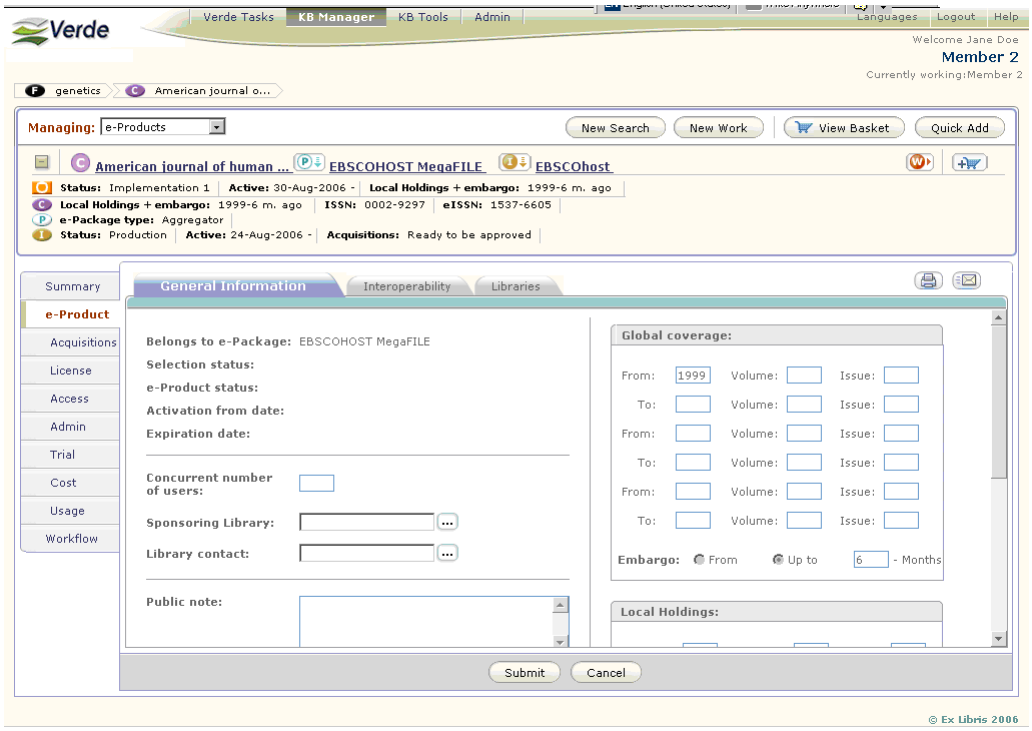


Figure 172: Merged View – e-Product Brief Summary

e-Product Summary Tab

The merged view in the e-product **Summary** tab is available to you in member instances for all e-products. The information is shown in the following sections: e-Product and Work Information, e-Product Information, Libraries, Acquisitions, Admin, Trial, and Workflow. All of the sections except the first are divided into two parts: **Local** and **Center**, where Local shows the data from the local (active) instance and Center shows the data from the central instance.

Most of fields in the first section contain values that cannot be configured and are therefore the same in all instances. These are Title, Global coverage, e-Product type, Interface, and free fields. All other sections contain fields from the e-product that are configurable and the values can therefore be different in different instances. These sections are divided into two columns to show information from the local (active) instance and from the central instance. The Library section displays only active libraries for the local instance.

The **Summary** tab includes several data types—text, icons, and links. The text is displayed regardless of your user permissions. However, linking to attributes is

available only to users with appropriate privileges. For example, linking to a license will be available only to a user with view license privileges.

Figure 173: Merged View – e-Product Summary Tab

The Summary page is configurable. For more information, see **Configuring the e-Product Summary** on page **436**.

Viewing Merged Data in the e-Package and e-Interface Lists

The e-package and e-interface lists can be modified to display e-product and selection statuses from both the local (active) instance and central instance. Once the e-package and e-interface lists have been properly configured (contact your Implementation or Support representative for details), the **Holdings** column appears in these lists instead of the **Selection Status** and **e-Product Status** columns. If an e-product is managed locally by an active instance, the instance name appears with an (L) and the e-product/selection statuses following this (if presented). If an e-product is managed by the center for an active instance, the instance name appears with a (C) and the e-product/ selection statuses follow this (if presented).

The following illustration shows merged data in the e-product list:

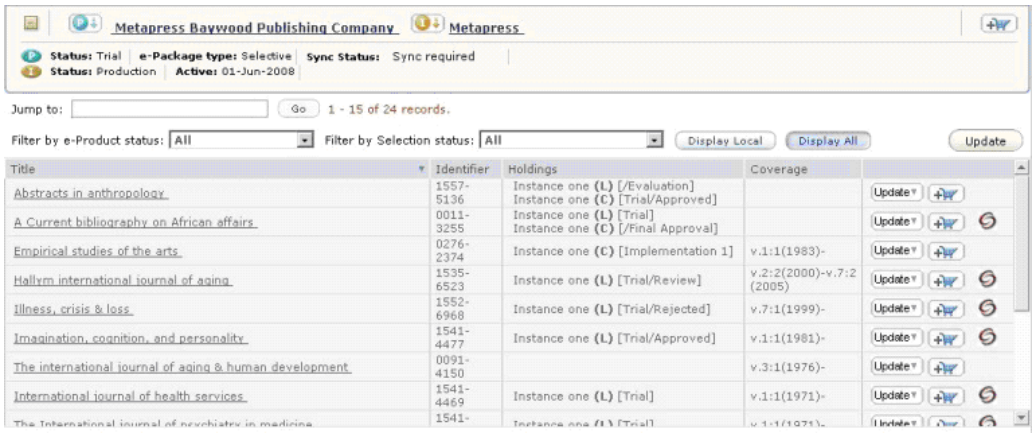


Figure 174: e-Package List – Merged Data

The following illustration shows merged data in the e-interface list:

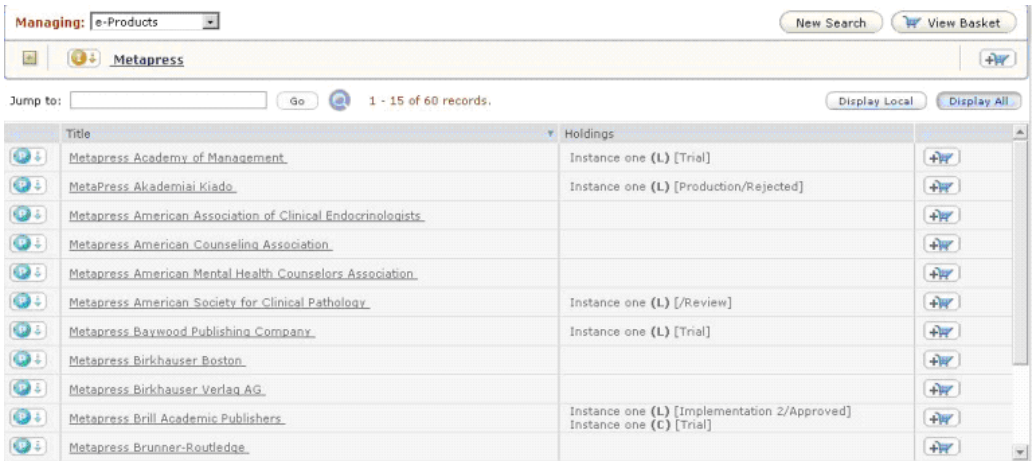


Figure 175: e-Interface List – Merged Data

Part 7

Interoperability

Part 7 contains the following:

- Section **49: Introducing Verde Interoperability** on page **475**
- Section **50: Synchronizing e-Product Updates with SFX** on page **481**

49

Introducing Verde Interoperability

This section includes:

- **About Verde Interoperability** on page **475**
- **Verde-SFX Interoperability** on page **476**

About Verde Interoperability

Verde can interoperate with other applications, such as SFX, ALEPH, and Voyager. Verde serves as a single point of maintenance for e-resource data that is shared by a library's suite of automation tools. It is intended to facilitate collection management decisions by providing information about the size and composition of the current collection, including data on the price of resources already in the collection.

Although Verde has no full acquisitions module, it can store acquisition information (order- and vendor-related details, invoices, price sharing) that can be updated from ALEPH via standard batch processes. At the same time, Verde can trigger certain actions in ALEPH. For more information about Verde-ALEPH interoperability, refer to the *ALEPH-Verde Interoperability Guide*.

Verde can also display acquisition information (order- and vendor-related details, invoices, price sharing) that is stored in Voyager. For more information about Voyager-Verde interoperability, refer to the *Verde-Voyager Interoperability Setup Guide*.

This section contains information on Verde-SFX interoperability and describes in detail the process of synchronizing e-product updates with SFX. For information on setting up Verde-SFX interoperability, refer to the *Verde-SFX Interoperability Setup Guide*.

Verde-SFX Interoperability

Verde and SFX communicate with each other in a number of different ways in order to provide the following functionality:

- Transfer locally created Verde e-product and work records to SFX
- Activation/deactivation – When an e-product of type e-constituent, e-package, or e-standalone is activated or deactivated in Verde, an update is sent to SFX.
- Update coverage – When the local coverage of an e-product of type e-standalone, e-package, or e-constituent is updated, an update is sent to SFX.
- Update embargo – When the local embargo is updated on an e-standalone or e-constituent, the data is sent to SFX.
- Update active libraries – When the list of active libraries is changed, Verde sends the data to SFX. Verde can update only SFX institutes; it does not update SFX groups.
- Update availability status – If an e-product is flagged as temporarily unavailable in Verde, SFX status is updated to down. SFX is updated when the e-product becomes available again. This functionality is available for e-standalones and e-packages.

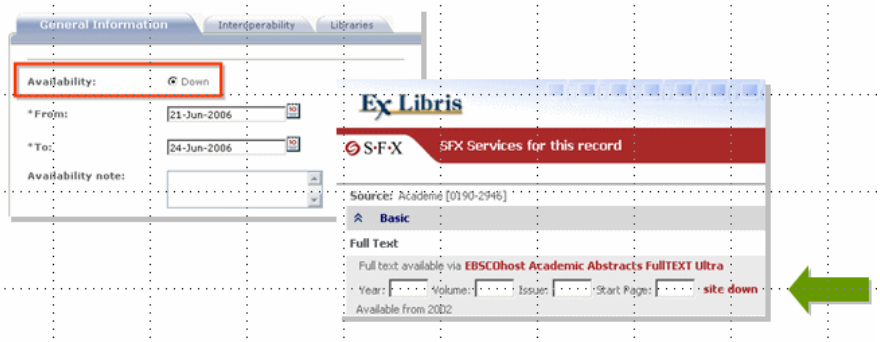


Figure 176: Availability Status

- Get license data – Verde sends SFX license and administrative information about an e-product to be displayed in the SFX menu.

  For example, active portfolios with getFullText services have a link to Verde. Click the **I** button to open an information window, which displays active license details as well as general information from Verde.

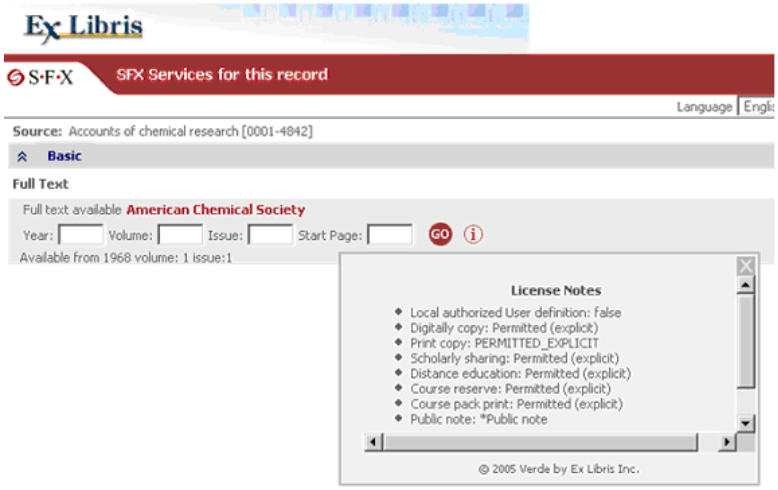

Ex Libris
SFX Services for this record
Language
Source: Accounts of chemical research [0001-4842]
Basic
Full Text
Full text available American Chemical Society
Year: Volume: Issue: Start Page: GO
Available from 1968 volume: 1 issue:1
License Notes
Local authorized User definition: false
Digitally copy: Permitted (explicit)
Print copy: PERMITTED_EXPLICIT
Scholarly sharing: Permitted (explicit)
Distance education: Permitted (explicit)
Course reserve: Permitted (explicit)
Course pack print: Permitted (explicit)
Public note: *Public note
© 2005 Verde by Ex Libris Inc.

Figure 177: Active License Details and General Information

The information is divided into two sections: **License Notes** and **General Notes**.

The **License Notes** section contains the following information from the license record (for the values that are defined in the record):

- Authorized user definition
- Local authorized user definition
- Citation requirement detail
- Digital copy
- Digital copy term note
- Print copy
- Print copy term note
- Scholarly sharing
- Scholarly sharing term note
- Distance education
- Distance education digitally term note
- Course reserve print
- Electronic link term note
- Course pack print

- Course pack term note
- Walk-in term use note
- Public note

The **General Notes** section contains the following information from the e-product and e-product admin records (for the values that are defined in the record):

- Hardware requirements – public
- Software requirements – public
- Maintenance window value
- Provider system status uniform resource indicator
- User documentation
- Public note

- Display U/P – Verde displays U/P data from SFX as part of the Verde access record.
- Deep linking – Users can deep link from the Verde e-product record to the SFX object portfolio or target service record. The deep link is available from the e-Product **Interoperability** tab and is accessed by clicking the SFX button that is displayed next to the SFX ID. Note that deep linking works only if the SFX ID is valid and exists in your SFX database and if the Verde-SFX link is set. The first time that you deep link during a session you have to log in; after that your user name and password is remembered.

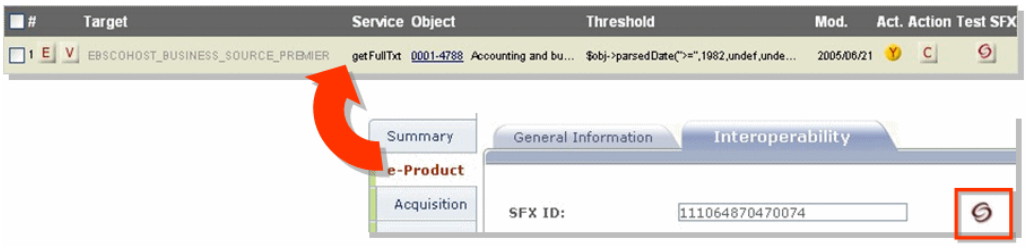


Figure 178: Deep Link from Verde e-Product Record

- Link to resource – Verde provides access to an SFX menu displaying the electronic full-text service for an active e-constituent from the results screen, from the package list, and from the e-product summary screen. It is available for active e-products only.

Figure 179: Linking to an Active Resource

50

Synchronizing e-Product Updates with SFX

This section includes:

- **Overview of Synchronization** on page **481**
- **Synchronizing Updates in Consortia** on page **483**
- **Synchronizing Locally Created e-Products** on page **489**
- **Performing Synchronization** on page **491**
- **Monitoring Synchronization History** on page **499**
- **Checking Which e-Products Require Synchronization** on page **504**
- **Performing SFX Setup** on page **505**

Overview of Synchronization

Verde and SFX both manage the activity status, libraries, and coverage of certain e-products. Verde enables you to synchronize with SFX from the Verde interface whenever you use Verde to update the activity status, libraries, or coverage of an e-package, e-standalone, or e-constituent that is managed in both SFX and Verde. When you update an e-constituent, you synchronize the entire e-package to which the e-constituent belongs. SFX synchronization eliminates the need to perform the same updates in SFX that you already performed in Verde.

Verde enables you to synchronize updates individually as well as in batches. You can synchronize an individual update as you make the update or at a later time. You can perform batch synchronization at any time and you can schedule batch synchronization to be carried out daily.

A Verde-SFX synchronization task includes processing by Verde, waiting for acknowledgement from SFX, processing by SFX, and receiving notification from SFX that the synchronization is processed. Verde provides an easy-to-

view history of synchronization events that shows you the status of each event. The synchronization report shows you what, if any, update occurred, what setup still needs to be performed, and if any errors occurred.

Verde enables you to see which e-products currently require SFX synchronization so that you can decide whether to perform individual synchronizations on selected e-products, perform batch synchronization, or wait for the next scheduled batch synchronization.

Note: Verde and SFX both require appropriate configurations for Verde-SFX synchronization. For the synchronization to work, each Verde instance-level library must contain the corresponding SFX instance code. In addition, a Verde library record must be created for each institute that exists in the corresponding SFX instance. The library record must contain the SFX institute code.

Both SFX and Verde must also have the same KnowlegeBase level. To verify your Verde KnowlegeBase level, click the Verde logo in the KB Manager module. For details, see **Verde Modules** on page **18**. Note that this verification is performed automatically by the synchronization process.

Updates that Require Synchronization

The following updates to an e-package, e-standalone, or e-constituent require synchronization:

- Adding a new e-package or e-constituent record to the Verde KnowledgeBase
- A change in activity status, including:
  - Setting the **activation** date when purchasing a new e-package or e-standalone. If the activation date is in the future, the synchronization is required on the activation date.
  - Canceling an e-package or e-standalone subscription. If the **deactivation** date is the current date, the synchronization is required immediately. If the deactivation date is in the future, the synchronization is required on the deactivation date.
  - Changing the **activation from** date or **expiration** date of an e-package, e-standalone, or e-constituent in such a way that it affects the activity status of the e-product
  - Changing the list of active e-constituents of an e-package
- A change to the set of libraries that have access to the e-product, including:
  - Setting the libraries when you activate a new e-package or e-standalone

- Changing the list of active libraries for an active e-package, e-standalone, or e-constituent

- A change in the local coverage of an e-standalone or e-constituent
- A change in the local embargo of an e-standalone or e-constituent
- A change in the update target of an active e-package or e-standalone, so that the update target is now SFX when it previously was not

Note: Updates to the Verde KB that are the result of running the KB update process are not sent to SFX.

Synchronizing Updates in Consortia

Verde supports the following two models of communication between SFX and Verde:

- **The symmetrical model** – In this model, each Verde instance communicates with a single SFX instance. This model is used by Verde and SFX consortia, as well as by single-site Verde and SFX installations in which each Verde instance has a corresponding SFX instance.

  The following diagram represents the symmetrical consortium model:

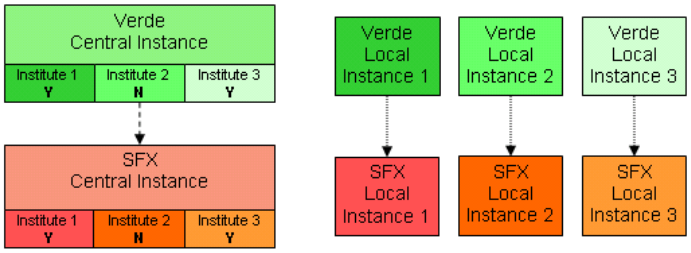


Figure 180: Symmetrical Consortium Model

In the above model, the synchronization process includes e-product analysis within an individual Verde instance and the transferring of the analysis results to the individual SFX instance with which the Verde instance is associated.

- **The asymmetrical model** – In this model, each local Verde instance has a corresponding SFX instance, but there is no corresponding SFX instance for the Verde central instance.

  The following diagram represents the asymmetrical consortium model:

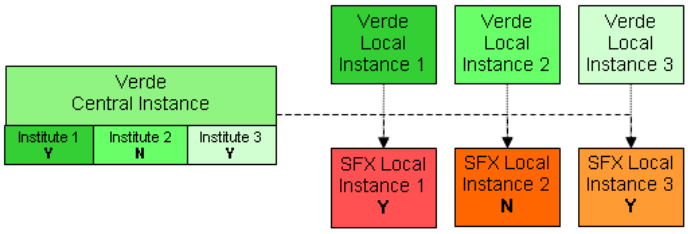


Figure 181: Asymmetrical Consortium Model

In the above model, the synchronization process includes e-product analysis within both an individual Verde instance and the Verde central instance. Results of the analysis are transferred from the Verde local instance to the SFX local instance with which the Verde local instance is associated.

In the asymmetrical model, there are two possible levels of communication between the central and member instances:

- The central instance is connected to an **entire** member instance. For this type of communication, you define only one library in the central instance for each local instance. You do not define any related institutes. (For details on defining libraries for this type of communication, see **Configuring Institutes** on page **444**. To enable the central instance to manage an e-product for this member instance, you select the library that represents this instance in **e-Product > Libraries**.
- The central instance is connected to **specific institutes** within a member instance. For this type of communication, a library can be defined in the central instance for each local institute to which the center is connected. The **Related institute** field should be defined as the local institute, as described in **Configuring Institutes** on page **444**. To enable the central instance to manage an e-product for a specific local institute, you select the library that represents this institute in **e-Product > Libraries**.

Example

If, for an e-product, certain local institutes are being managed by the central instance and other local institutes are being managed by member instances, it is recommended that you create the following in the central instance:

- library records for the local institutes that are to be managed by the center (with the **Related instance** defined as the member instance, and the **Related institute** defined as the local institute)

- a single library record with the **Related instance** defined as the member instance, and the **Related institute** value left undefined

In the center, choose **e-Product > Libraries** and select the libraries representing the local institutes that are to be managed by the center for this e-product. The center then manages the e-product only for those local institutes for which library records were defined in the center (#1). All other local institutes in the member instance are managed by the member instance for this e-product.

For example, if there are 50 local institutes in a member instance and, for a specific e-product, only institutes B and C are to be managed by the central instance, you would create two libraries (for example, B_i and C_i) to represent these institutes, and one library (for example, A) to represent all the other institutes that are a part of the member instance. When creating library A, you would define the **Related instance** as the member instance and you would leave the **Related value** undefined. You would then choose **e-Product > Libraries** and select only libraries B_i and C_i – and not library A -- in the **Libraries** tab. The e-product would thus be managed by the center for institutes B and C, while the member instance would manage the e-product for institute A.

Synchronization Rules

If the central instance is connected to an **entire** member instance, Verde is synchronized with SFX as follows:

- If an e-product is active in the central instance and not active in the local instance, the parallel SFX item is activated for the default (**All libraries** in the Libraries tab).
- If an e-product is inactive in the central instance and active in the local instance, the parallel SFX item is activated according to the default in the local instance's Libraries tab. All the local SFX institutes that correspond to the libraries selected in this tab are also activated.
- If an e-product is active in both the central instance and local instance, the parallel SFX item is activated according to the default in the local instance's Libraries tab. All the local SFX institutes are also activated.
- If an e-product is inactive in both the central instance and local instance, the parallel SFX item is deactivated.

Table 83. Synchronization in Asymmetrical Model – Entire Instance

	e-Product in Central Instance	e-Product in Member Instance	How Parallel Item Is Updated During Synchronization
1	Active	Inactive	Activated for default

Table 83. Synchronization in Asymmetrical Model – Entire Instance

	e-Product in Central Instance	e-Product in Member Instance	How Parallel Item Is Updated During Synchronization
2	Inactive	Active	Activated according to the default in the local instance; also activates all SFX institutes corresponding to the libraries selected in the local instance
3	Active	Active	Activated according to the default in the local instance; also activates all the local SFX institutes
4	Inactive	Inactive	Deactivated

If the central instance is connected to **specific member institutes**, Verde is synchronized with SFX as follows:

- If an e-product is active in the central instance and not active in the local instance, the parallel SFX item is activated in one of the following ways:
  - If, for this e-product, 50% or more of the local institutes are managed by the center, the parallel SFX item is activated for the default.
  - If, for this e-product, fewer than 50% of the local institutes are managed by the center, the parallel SFX item is deactivated for the default. The parallel SFX item is, however, activated for all the local SFX institutes that correspond to the libraries selected in the central instance's Libraries tab.
- If an e-product is inactive in the central instance and active in the local instance, the parallel SFX item is activated according to the default in the local instance's Libraries tab. The parallel SFX item is also activated for all the local SFX institutes that correspond to the libraries selected in this tab.
- If an e-product is active in both the central instance and the local instance, the parallel SFX item is activated in one of the following ways:
  - The parallel SFX item is activated for the local SFX institutes that correspond to the libraries selected in either the central or local instance's Libraries tab.
  - If the default is selected in the local instance, the parallel SFX item is activated for the default.
  - If the default is not selected in the local instance, the parallel SFX item is deactivated for the default.
- If an e-product is inactive in both the central instance and local instance, the parallel SFX item is deactivated.

Table 84. Synchronization in Asymmetrical Model – Specific Member Institutes

	e-Product in Central Instance	e-Product in Member Instance	How Parallel Item Is Updated During Synchronization
1	Active (more than 50% of local institutes are managed by the center)	Inactive	Activated for default
2	Active (fewer than 50% of local institutes are managed by the center)	Inactive	Activated for the SFX local institutes that correspond to the libraries selected in the center's Libraries tab. The default is deactivated.
3	Inactive	Active	Activated according to the default in the local instance; also activates all SFX institutes corresponding to the libraries selected in the local instance
4	Active	Active	Activated according to the default in the local instance; also activates any local SFX institutes that correspond to libraries selected in either the central or local instance
5	Inactive	Inactive	Deactivated

Note: You can define certain member instances as independent. If you do so, synchronization is performed as in the symmetrical model described above. e-Product updates in the central instance will not affect your SFX instance. To enable this feature, contact your Implementation or Support representative.

SFX Tasks After Synchronization

SFX synchronization can activate an SFX e-product's highest level service—usually Full Text-only—and set the appropriate coverage and libraries for this service.

The Verde KnowledgeBase contains packages that match SFX targets and the highest level of these targets' services. The hierarchy of target service levels is as follows:

- Full Text

- Book Review
- Abstract
- Table of Contents

For example, if in SFX there is a target with two services, **Full Text** and **Abstract**, the corresponding Verde package will be based on the combination of the target and the Full Text service. The Abstract service will not be converted to Verde. Most Verde packages match targets with the Full Text service. However, if a target in SFX does not have the Full Text service but has, for example, the Abstract and Table of Contents services, the matching Verde package will be based on the combination of the target and the Abstract service. In this case, the Table of Contents service will not be converted to Verde.

If an e-product requires further tasks, these tasks must be performed in SFX.

The following may be required and can be performed in SFX only:

- Setting up linking
- Setting a user name and password for access to an e-product
- Activating lower services if there is more than one service related to a particular target. The highest level service is activated automatically by the synchronization process when the target is activated in Verde, whereas the others should be activated manually in SFX.

After SFX synchronization, Verde informs you of which e-products require SFX setup. SFX setup can be performed using SFX only.

The following are optional and you may want to perform them in SFX after synchronization:

- Setting the public name
- Setting the proxy to 'yes'
- Adding authentication information
- Adding a public note
- Setting JKEY (for locally created e-products)
- Setting auto active status (for locally created e-products)

Synchronizing Locally Created e-Products

Records of e-products that are locally created and are therefore not part of the Ex Libris KnowledgeBase can be transferred from Verde to SFX automatically as part of the synchronization process. Records are transferred from Verde to SFX if they meet the following criterion; the record is a work, e-package, or e-constituent record, the update target of the package or the e-constituent's package is SFX, the record does not have an SFX ID. e-Standalone records are not transferred automatically to SFX even if the update target is SFX. For more information about synchronizing e-standalone records, see **e-Standalone Records** on page **491**.

Adding New Records

Once synchronization has been initiated for an e-package, Verde checks to see that the package and all of its constituents have SFX IDs. Records that do not have SFX IDs are not part of the SFX KnowledgeBase and Verde must transfer the record to SFX. When this occurs, the sync status **Adding new records** will appear in the e-product summary.

The following table shows the relationship between entities in Verde and in SFX.

Table 85. Relationship Between Entities in Verde and SFX

Verde Entity	SFX Entity
Work	Object
e-Constituent	Object portfolio
e-Package	Target, Target service (full text)
e-Interface	Interface
e-Standalone	Object portfolio

Note: Some, but not all, e-standalones appear in both Verde and SFX. As a general rule, e-standalones that are journals do belong in SFX, while those that are databases do not.)

Data from the e-package, e-constituent, and work records are sent to SFX. Fields that do not appear in the table below are not being transferred automatically from Verde to SFX. Note that in Verde, bibliographic identifiers like ISSN, eISSN, ISBN, and eISBN can be included in locally created work records as long as they do not duplicate existing identifiers. When work data is transferred to SFX, the identifiers are included.

Table 86. Entities in Verde and SFX

Field-Verde	Entity-Verde	Field_SFX	Entity-SFX
ISSN	Work	ISSN	Object
eISSN	Work	eISSN	Object
ISBN	Work	ISBN	Object
eISBN	Work	eISBN	Object
LCCN	Work	LCCN	Object
CODEN	Work	CODEN	Object
Main Title	Work	Title	Object
Type	Work	Object type	Object
Package Title	Work	Target name	Target, Target service
Package type	e-package	Status	Target
Interface Title	Work	Interface name	Interface

e-Standalone Records

e-Standalone records in Verde can be journals that do not belong to a package or databases. Standalones that are journals and are part of the KnowledgeBase are already in SFX and have an SFX ID; these standalones are synchronized by the SFX Sync and do not need to be pushed. Standalones that are databases belong in Verde but not in SFX. Standalones that are journals but are not part of the KnowledgeBase do belong in SFX.

For sites that have a lot of locally created journals that are not part of a package, we recommend that they create a pseudo-package so that the constituents of the package can be transferred automatically to SFX. The package should be assigned a name such as **Miscellaneous Local Journals** and should have SFX as the update target. Journals that are constituents of this package will be transferred to SFX as object portfolios of the same target. The advantage of creating a pseudo-package instead of creating a lot of standalones is that the package and its constituents will be transferred while individual standalones will not be.

Assigning the SFX ID

When the Verde record is transferred to SFX, SFX creates the appropriate SFX record or records and assigns SFX IDs. These IDs are sent back to Verde where they are inserted in the Verde record as follows:

Table 87. SFX-Verde ID Assignments

SFX ID	Verde ID
Object portfolio internal ID	e-Constituent SFX ID
Target internal ID	e-Package SFX ID2 (does not display in the UI)
Target service internal ID	e-Package SFX ID
Interface internal ID	e-Interface SFX ID

Performing Synchronization

Verde enables you to synchronize e-product updates individually or as a batch task.

Note: Both options are controlled by the **Run SFX synch** user privilege. For more information, see **KB Tools Module Privileges** on page **398**.

Synchronizing per e-Product

Whenever you add, activate, update, or cancel a resource, Verde informs you that synchronization with SFX is required. You can synchronize an update from the e-product record at any time. This enables you to update SFX immediately instead of waiting for the update to be synchronized by the next scheduled batch synchronization.

Note: You cannot synchronize an update to a single e-product while a batch synchronization task is in process.

To synchronize a single update to an e-package or e-standalone:

1. From the e-product record in the KB Manager module, make the required addition, activation, update, or cancellation. For example, if you need to change the date from which a certain e-package will be activated, search for the e-package, click the **e-Package List** button to navigate to the e-package from the search results screen, and change the date that appears in the **Activation from date** field.
2. If the update you made was an update to an e-constituent, navigate to the e-package to which the e-constituent belongs.
3. Click the **Link to Resource** button . If the process does not begin, one of the following errors may appear.

Table 88. Synchronization Errors

Error	Description	Recommended Action
The SFX sync task is already running, your sync request cannot be sent.	The sync process is running.	Wait and try again.
SFX is busy, your sync request cannot be processed.	SFX is processing an earlier request.	Wait and try again.
Your sync process cannot be processed at this time, the SFX server is not responding.	There is a problem with the SFX server.	Report the error to your DBA or server manager.

Table 88. Synchronization Errors

Error	Description	Recommended Action
The Verde and SFX KB revision numbers do not match, the sync process has been aborted.	There is problem with the KnowledgeBase levels. Synchronization is not permitted.	Report the error to your DBA or server manager. They need to run a KB update on either Verde or SFX. To verify your Verde KnowlegeBase level, click the Verde logo in the KB Manager module. For details, see Verde Modules on page 18.
Failed to initiate the sync process.	There is a problem with Verde.	Report the error to your DBA or server manager.
The sync process for this e-product cannot be initiated at this time; the sync task is already running. Please try again after the sync job has completed.	A synchronization task is already running.	Try again later.
Failed to add local created e-products to SFX.	SFX was not able to create new records and return SFX IDs to Verde.	Report the error to the SFX liaison.
There is already an SFX TARGET entry with the value **title of package**	SFX was not able to create a new target record because a target with that name already exists	Check the situation in Verde and take the appropriate actions so that there are not two packages with the same name.

During the synchronization process, the sync status display field in the e-product brief summary displays the changing status of the synchronization. The status moves through the following, in sequence:

1. Sync required
2. Adding new records
3. In process – Verde
4. Sync waiting for SFX
5. In process – SFX
6. Synced

Once the sync process has been initiated, click the **check status** link that displays in the e-product summary to report on the status of the sync process. A popup window opens with the current status of the sync process. If there is a

problem with the sync process, the process will be cancelled and the e-product flagged as **sync required**.

Once an e-product has been synced, a sync status display field appears in the e-product brief summary and displays one of the following statuses:

- **Done – SFX updated** – SFX is updated successfully and no further action is required.
- **Done – SFX not updated** – The synchronization was completed but resulted in no changes to SFX.
- **Done – SFX setup required** – SFX is updated successfully and SFX setup is required for the e-product. For information about performing SFX setup, see **Performing SFX Setup** on page **505**.
- **Error** – The synchronization was not completed successfully. If this status is the result, Verde resets the sync status to **Sync required** and the next scheduled batch synchronization includes the e-product.

Batch Synchronizing

Verde enables you to batch synchronize all e-product updates that are waiting for synchronization. You can schedule a batch synchronization to be performed automatically at a regular time and interval, and you can do one-time batch synchronizations.

A batch synchronization task automatically processes:

- All e-product updates of the types described in **Updates that Require Synchronization** on page **482**, unless they were already synchronized
- e-Products that need to be activated or deactivated on the day of the task because of a purchase or cancellation made in the past for this date
- All e-product updates managed locally by your Verde instance. If your Verde instance is the central instance of a consortium, the local instances must synchronize any updates made to e-products that they manage locally.
- All e-product updates performed by the central instance of your consortium, if you are managing a local instance of a consortium and the consortium has no central SFX instance

To check which e-products currently require synchronization, see **Checking Which e-Products Require Synchronization** on page **504**.

While a batch synchronization task is in process, users cannot synchronize any single e-product updates. The scheduling option enables you to schedule batch synchronization to take place every day, week, or month, at any time of day you specify. The optimal choice is usually to schedule a batch synchronization to take place early every day, outside users' work hours. This avoids interfering with users' ability to synchronize individual updates, and makes sure that

activations and deactivations scheduled for the current date are pushed to SFX at the beginning of the day.

When a batch synchronization task is complete, you can see if the task was completed successfully and you can view an output report for the task. For information about viewing the task output report, see **Viewing Batch Synchronization Reports** on page **497**.

For information about checking which e-products require SFX setup after synchronization and following up on synchronization errors, see **Monitoring Synchronization History** on page **499**.

To configure and run a scheduled or one-time batch synchronization:

1. From the Verde menu bar, select **KB Tools**.
2. From the **Select a tool** drop-down list, select **Task**. The Task menu opens.
3. From the **Task** menu, select **SFX Sync**. The Delivery properties dialog box opens.

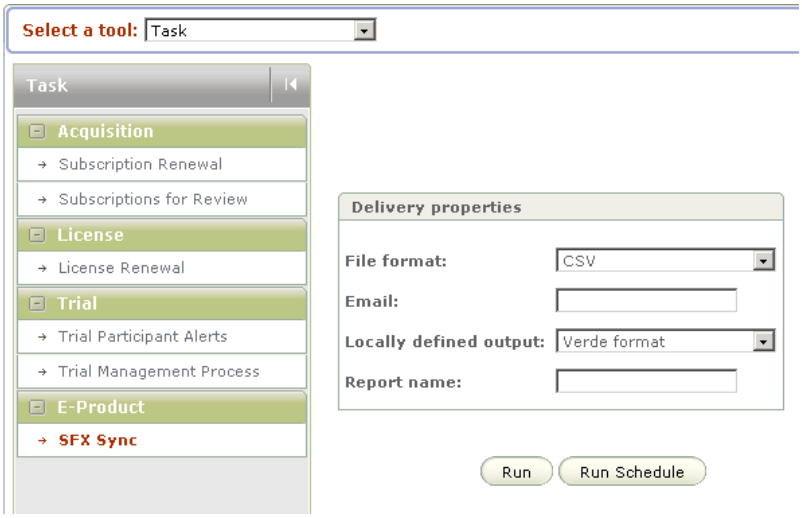


Figure 182: Delivery Properties Dialog Box

4. From the **File format** drop-down list, select a file format for the task output report.
5. In the **E-mail** field, enter any e-mail address(es) to which a notification should be sent when the tasks ends. The notification provides a link to the task output report. To enter more than one address, separate the addresses with semicolons (;).
6. (Optional) From the **Locally defined output** drop-down list, select a custom format for the task output report.
7. In the **Report name** field, enter a name for the task output report.

8 If you want to run the batch synchronization immediately:

a Click **Run**. A **Request was submitted successfully** message appears.

b Click **OK**. The batch synchronization is triggered immediately.

Note: While a batch synchronization task runs, users cannot simultaneously synchronize any single updates online.

9 If you want to run the batch synchronization on a schedule:

a Click **Run Schedule**. The Scheduling properties dialog box opens below the Delivery Properties dialog box.

Figure 183: Scheduling Properties Dialog Box

b In the **Start** field, enter the time at which you want the synchronization task to start running. Use the 24-hour clock format **hh:mm**, where **hh** is the number of hours and **mm** is the number of minutes.

Note: While a batch synchronization task runs, users cannot synchronize any single updates online. You can avoid any conflicts by scheduling the synchronization for outside users' regular work hours.

c Under **Recurrence pattern**, select one of the following:

- **Daily** – to schedule the synchronization to run once a day at the time you specified.
- **Weekly** – to schedule the synchronization to run once a week, at the time you specified.
- **Monthly** – to schedule the synchronization to run once a month, at the time you specified.

d If you want the synchronization to run on weekend days, select **Include weekends**. Otherwise, the synchronization does not run on weekend days.

e In the **Start date** field, enter the date on which you want the first synchronization to run. To enter the date, click the **Calendar** button. A calendar appears in a pop-up window. On the calendar, select the date you want to enter.

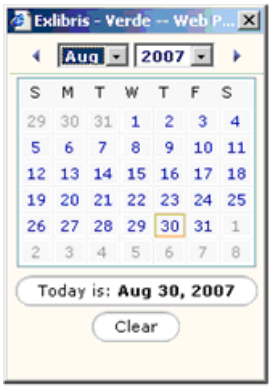


Figure 184: Calendar Pop-Up Window for Date Selection

f In the **End date** field, enter the date on which you want to end the scheduled batch synchronization. To enter the date, click the **Calendar** button. A calendar appears in a pop-up window. On the calendar, select the date you want to enter.

g Click **Run Schedule**. A **Request was submitted successfully** message appears.

h Click **OK**. The batch synchronization is scheduled.

Viewing Batch Synchronization Reports

When a batch synchronization task is complete, a task output report tells you which e-products were processed during the task. If there were any errors, a summary of the errors is available. If you configured e-mail addresses as part of the batch synchronization process, an e-mail is sent to the e-mail addresses notifying the recipients that the task is complete and providing a link to the output report. You can also access the report from Verde.

To view a batch synchronization task output report from Verde:

1 From the **Select a tool** drop-down list, select **View Task Output**.

2 From the **e-Product** section of the **Task** menu, select **SFX Sync**. The following window appears.

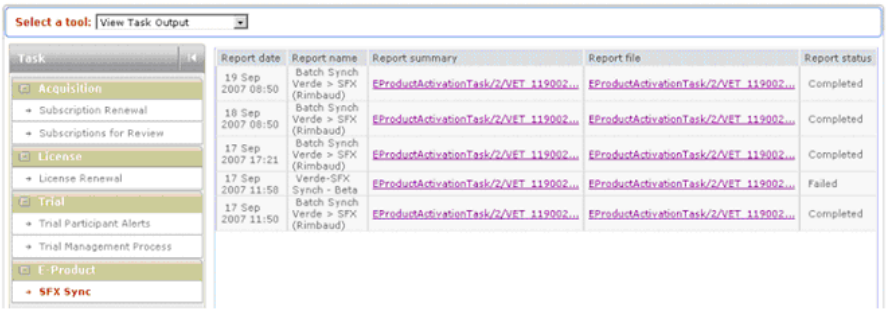


Figure 185: SFX Sync – View Task Output

3 Identify the report you want to view by the **Report date**, which specifies the date and time of the report completion, and the **Report name**, if a report name was configured for the task. The **Report status** column indicates one of the following:

- **In Process** – The task is still in process.
- **Failed** – The task failed. You can link to the report summary in the Report summary column to view any recorded errors. If there is no report summary, a log is available on the Verde server. For access to the log on the Verde server, contact your IT department.
- **Completed** – The task is complete and the report is ready to view.

4 When the Report status column displays **Completed**, click the link in the **Report file** column. The File Download dialog box opens.

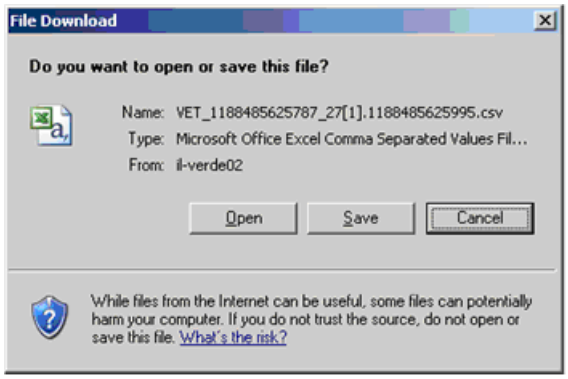
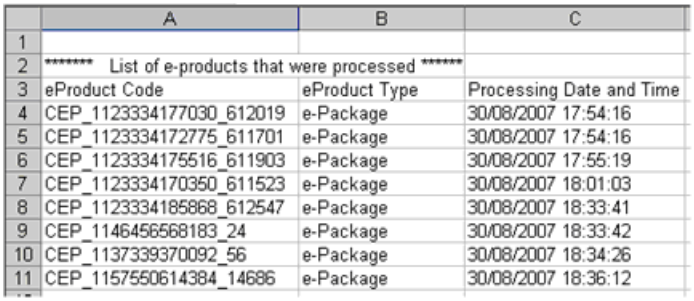

File Download
Do you want to open or save this file?
Name: VET_1188485625787_27[1].1188485625995.csv
Type: Microsoft Office Excel Comma Separated Values Fil...
From: il-verde02
Open
Save
Cancel
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Figure 186: File Download

5 Perform one of the following actions:

- Click **Open** to open the file immediately. An output report file opens on your computer.
- Click **Save** to download the file and save it. An output report file, such as the following, is saved to the location you specify.



	A	B	C
1			
2	******* List of e-products that were processed ******		
3	eProduct Code	eProduct Type	Processing Date and Time
4	CEP_1123334177030_612019	e-Package	30/08/2007 17:54:16
5	CEP_1123334172775_611701	e-Package	30/08/2007 17:54:16
6	CEP_1123334175516_611903	e-Package	30/08/2007 17:55:19
7	CEP_1123334170350_611523	e-Package	30/08/2007 18:01:03
8	CEP_1123334185868_612547	e-Package	30/08/2007 18:33:41
9	CEP_1146456568183_24	e-Package	30/08/2007 18:33:42
10	CEP_1137339370092_56	e-Package	30/08/2007 18:34:26
11	CEP_1157550614384_14686	e-Package	30/08/2007 18:36:12

Figure 187: Batch Synchronization - Sample Output Report (CSV File)

In the default Verde output report format, the report provides the following information:

- **e-Product Code** – The unique code for each e-product that was processed during the synchronization.
- **e-Product Type** – Displays either **e-Package** or an **e-Standalone**.
- **Processing Date and Time** – The date and time of the e-product processing.

Note: If a custom report format is used, the report may display a different set of output fields.

Monitoring Synchronization History

You can view the synchronization history per e-product or for the entire instance. The sync history enables you to manage the synchronization status of the e-products in your instance.

To view the synchronization history for a specific e-product:

From the e-product record in the KB Manager module, click the **Sync History** tab. The SFX Sync History screen is displayed.

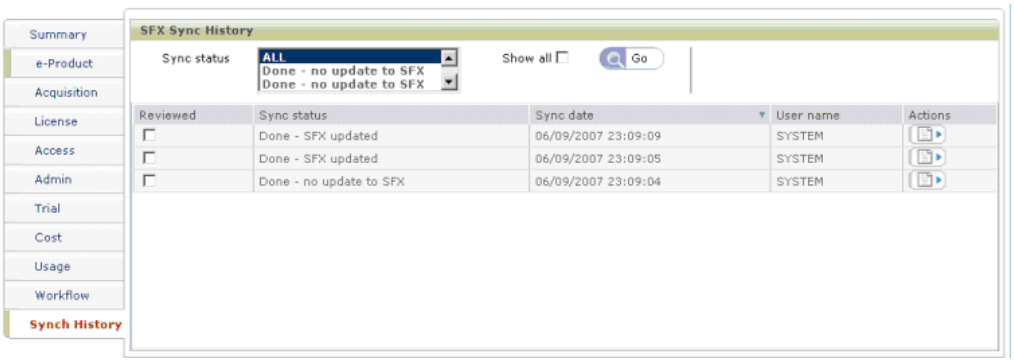


Figure 127. SFX Sync History – per e-Product

This screen displays all synchronization tasks that were triggered for the e-product.

To view the synchronization history for all e-products:

1 From the Verde menu bar, select **KB Tools**.

2 From the **Select a tool** drop-down list, select **SFX Sync - History**. The SFX Sync History screen is displayed.

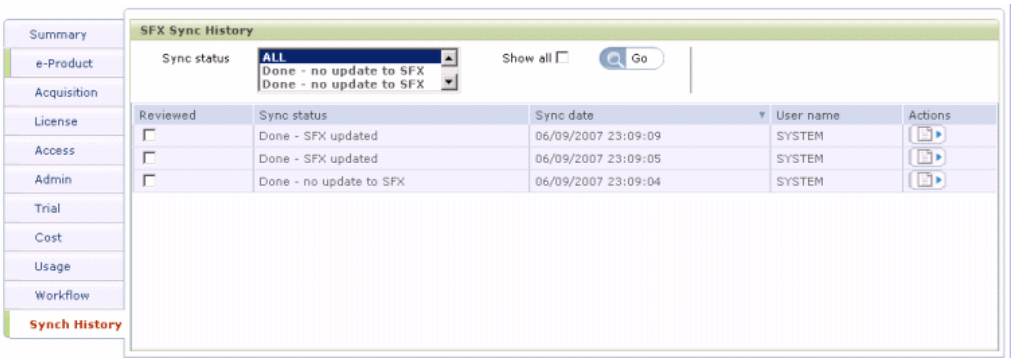


Figure 188: SFX Sync History – All e-Products

This screen displays a history of the synchronization tasks that were triggered for all e-products.

You can perform the following tasks in this screen:

- Filter tasks by synchronization status, using the **Sync status** drop-down list. This makes it easy for you to work through the list of e-products that require SFX setup, or to investigate all errors.
- Filter tasks by date, using the **From** and **To** filter fields.

- Mark an entry as reviewed by clicking the **Reviewed** check box, when you have handled SFX setup or resolved an error.
- Show or hide entries marked as reviewed. By default, when you mark an entry as reviewed, it is hidden. When you click **Show all**, all entries are shown, including those marked as reviewed.
- Display a log of a task, by clicking in the Action column. The report contains two tabs. One contains a report of updated records; the second contains a report of new records. Both provide links to SFX, which enables you to perform SFX setup for the e-product, if necessary.
- Differentiate between scheduled and manual synchronization tasks. If the task was triggered by the scheduler, the User name column displays SYSTEM. If the task was triggered by a user, the User name column displays the name of the user who triggered the task.
- Navigate to the record of the e-product synchronized by a task, by clicking for an e-package or for an e-standalone.
- Sort tasks by title, synch status, synch date, or user name.

Using Synchronization History to Manage SFX Setup Requirements

The Synchronization History enables you to easily view which e-products require SFX setup after synchronization, to link to SFX and perform the setup, and to mark off the SFX setups you have completed.

To manage SFX setup requirements:

1. From the **Sync status** drop-down list, select **Done - SFX setup required**.
2. Click **Go**. The synchronization history screen now displays only those synchronization tasks whose status is **Done – SFX setup required**.

3 In the **Action** column, click the **Task Log** button . The log for the task appears in a pop-up window.

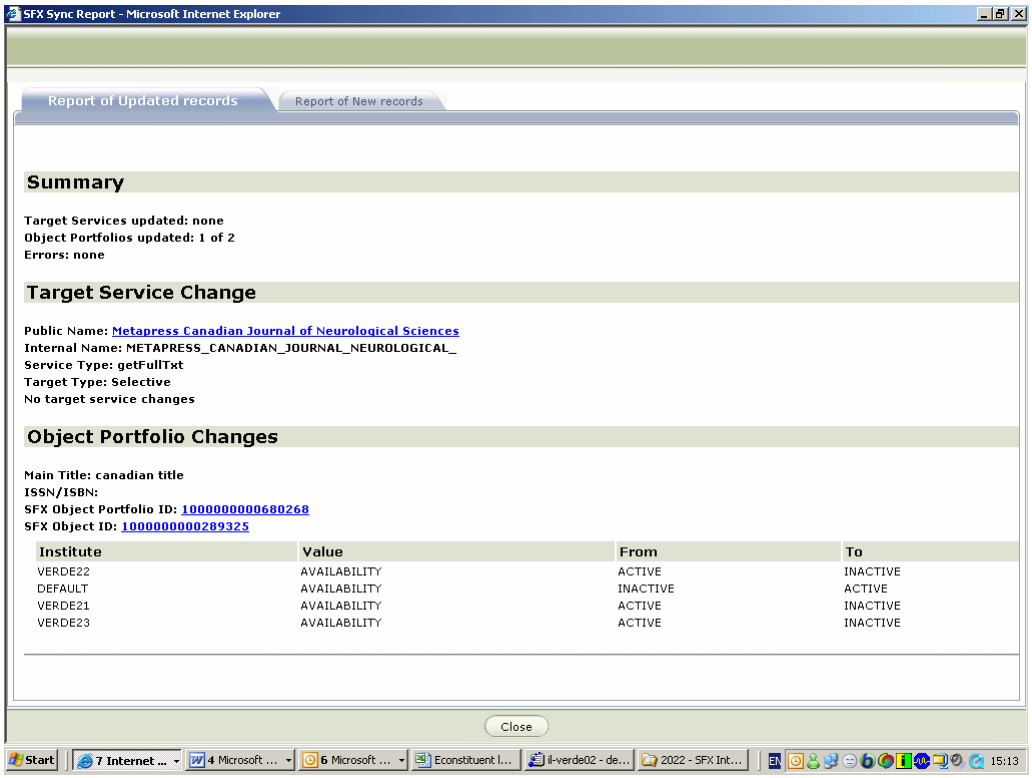


Figure 189: Synchronization Task Log

4 Click the **Public Name** link to navigate to SFX. The SFX login screen appears.

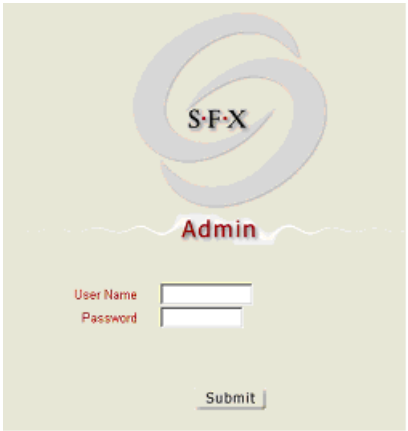


Figure 190: SFX Login Screen

5 Enter your user name and password.

6 Click **Submit**. You are logged into SFX.

7 Set up a user name and password for the e-product. For information about using SFX, refer to the *SFX 3.0 User Guide*.

8 In the Verde-SFX Sync History screen, select the **Reviewed** check box for the entry to mark the entry as reviewed.

Using Synchronization History to Handle Errors

The Synchronization History screen enables you to easily view the synchronization tasks that resulted in errors, investigate these errors, and rerun the synchronizations if necessary.

To handle task errors:

1 From the **Sync status** drop-down list, select **Error**.

2 Click **Go**. The synchronization history now displays only those synchronization tasks whose status is **Error**.

3 For each task, click the **Task Log** button in the **Action** column. The log for the task appears in a pop-up window.

4 View the errors in the log. The following table describes errors that may appear in the log and recommended actions to take in order to resolve these errors.

Table 89. Synchronization Task Errors

Logged Error	Description	Recommended Action
Sync task failed at status Verde processing/Waiting for SFX/SFX processing/ Adding new records.	The sync process failed when it was at the specified status. The e-product has been flagged **sync required** and will be synchronized when the next scheduled batch synchronization task is run.	No action required.
Failed to add locally created e-products to SFX.		
Interface entity required when adding target.	The locally created e-package is not connected to the interface.	Connect the package to the interface using the e-product's **Belong to e-Interface** button.

Table 89. Synchronization Task Errors

Logged Error	Description	Recommended Action
There is already an SFX target with the value **<package title>**	Package with the same title is already connected to the interface.	Remove the duplicate package.

5 After taking action, view the log again. If the log reports **recovered from status ready**, navigate to the e-product record using the **e-Product** or **e-Standalone** buttons in the third column of the Synchronization History page.

6 Confirm that the e-product has been synchronized or that synchronization is scheduled for the e-product.

7 If necessary, report to your IT department so that they can investigate the Verde-SFX communication problems.

Checking Which e-Products Require Synchronization

Verde enables you to display a list of e-packages and e-standalones that currently require synchronization with SFX. The set of e-products that require synchronization in your instance may include e-products managed by another instance, or may exclude e-products managed in your instance. For more information on which e-products are included, see **Updates that Require Synchronization** on page **482**.

To display e-products that require synchronization:

1 From the Verde menu bar, select **KB Tools**.

2 From the **Select a tool** drop-down list, select **SFX Sync – To Be Synced**. The SFX To Be Synced list appears.

Figure 191: SFX To Be Synced List

The Sync Status column displays the synchronization status **Sync required** for e-products that are in the synchronization queue.

You can use the **e-Product** or **e-Standalone** buttons to view the e-products. This enables you to synchronize any of the e-products immediately, as described in **Synchronizing per e-Product** on page **492**. If the list is very long and you have a daily batch synchronization that takes place at night, you might want to check that the e-products on the list were updated during the current day. If the e-products have been waiting since before the last scheduled batch synchronization, check the status of the batch synchronization task (see **Monitoring Synchronization History** on page **499**).

Checking Which e-Products Are Being Synchronized

The Verde-SFX To be Synced list displays a list of e-products currently being synchronized.

To display a list of the e-products currently being synchronized:

1. From the Verde menu bar, select **KB Tools**.
2. From the **Select a tool** drop-down list, select **SFX Sync – To Be Synced**. The Verde-SFX To be Synced list appears. The Sync Status column displays the current synchronization status of each e-product. If an e-product is currently being synchronized, one of the following statuses appears:
   - Waiting for SFX
   - In process – Verde
   - In process – SFX

If there are many e-products for which synchronization is currently in process, you may want to use the **e-Product** or **e-Standalone** buttons to view the e-products and check their sync statuses. The check recovers processes that are not running properly and marks e-products for updates.

Performing SFX Setup

When an SFX synchronization task results in the status **Done – SFX setup required**, the synchronized e-product requires SFX setup in SFX. Verde enables you to deep link to SFX to perform this setup.

To deep link to SFX and perform setup for an e-product:

1. Open the e-product.
2. From the **Options** menu, select **e-Product**.
3. Select the **Interoperability** tab.
4. Click the **Link to Resource** button . The SFX login screen opens.

5 Enter your user name and password and click **Submit**. You are logged into SFX.

6 Set up a user name and password for the e-product. For information about using SFX, refer to the *SFX 3.0 User Guide*.

When you have finished, you can use the Synchronization History screen to mark the synchronization task as reviewed (see **Monitoring Synchronization History** on page **499**).

Part 8

Appendixes

Part 8 contains the following:

- Appendix **A: Indexing** on page **509**
- Appendix **B: Explanation of Fields** on page **511**

A

Indexing

Searching e-products in the KB Manager is possible on a number of defined indexes. These indexes are built from fields in the e-product record:

Table 90. Indexing

Field	Indexes
Title index (WTI)	210, 222, 240, 245, 246, 249, 785, 780
Identifier (WVI)	090
Name (WNA)	100, 110
Category (WCT)	690
License Code/Name (WLN)	546, 969

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Explanation of Fields

This section includes:

- **Acquisition Fields** on page **511**
- **License Fields** on page **515**

Acquisition Fields

Table 91. Acquisition Fields

Code	Data Element Name	Definition
ACQUISITIONCODE	Acquisition Identifier	The identification number assigned to the Acquisition by the electronic resource management system
ACQUISITIONMETHOD	Method	Method of acquisition
ACQUISITIONNUMBER	Acquisition Number	The acquisitions number
ACQUISITIONSTATUS		The status of the acquisition record
ACQUISITIONSTATUSDATE	Acquisition Status Date	The date that the acquisition status was assigned
ADVANCENOTICEDATE	Advance Notice Date	Calculated by the system based on the advance notification period and the acquisition end date.
AUTORENEWAL	Renewal Type	A clause which specifies whether renewal is automatic or explicit

Table 91. Acquisition Fields

Code	Data Element Name	Definition
BUDGETS	Budgets	The names of the budgets or funds that is paying for the subscription.
CONCURRENTUSERSNOTE	Concurrent User Note	■ A specific explanation of how users are allocated or shared if pooled or platform-based ■ Additional information about the number of concurrent users
CONSORTIALAGREEMENT	Consortial Agreement Indicator	Indicates whether an acquisition falls under a multiparty agreement that uses the same license for all parties
CREATEEDBY	Created By	Verde user
CREATIONDATE	Created Date	Date of creation
CURRENCY	Currency	The acquisition payment currency. Default value is U.S.D. The default can be changed using the Codes section of the Admin module
DISCOUNTONPRICE	Discount on Price	A discount in price or in pricing formula
ID		
ILSSUBSCRIPTIONNO	ILS Subscription No.	The Subscription number in the ILS
INFLATIONRATE	Inflation Rate	The inflation rate (defined in percentage terms).
INSTANCECODE	Instance code	The instance code (logical identifier of an instance) where acquisition record was created.
LISTPRICE	List price	Publishers list price
MATERIALTYPE	Material Type	Material Type
NETPRICE	Net price	Net price of the order

Table 91. Acquisition Fields

Code	Data Element Name	Definition
NOTEFORILS	Note for ILS	Note for ILS
NOTEFORVENDOR	Note for Vendor	Note to be included in correspondence with vendor
NOTICEPERIODCODE	Notice Period Code	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record
NUMBEROFCOPIES	Number of Copies	Number of copies (related only to e-print)
POOLEDCONCURRENTUSERS	Pooled Concurrent Users	The number of concurrent users if shared across a consortium rather than within a specific institution
ORDERDATE	Order date	The start date of the first subscription
ORDERSENDMETHOD	Order Send Method	Not displayed in UI. Method by which the letter is sent. The information is received from ALEPH (order delivery type).
POOLEDCONCURRENTUSERS	Pooled concurrent users	The number of concurrent users if shared across a consortium rather than within a specific institution. This number may be spread across one or more e-products.
PRICE	Price	The amount paid for the product
PRICENOTE	Price note	Note field that contains additional information regarding the subscription price.
PRICINGCAP	Price Cap	The maximum percentage of annual increase in a multi-year agreement
PRICINGCAPFROM	Pricing Cap From	Dates on which the price cap begins

Table 91. Acquisition Fields

Code	Data Element Name	Definition
PRICINGCAPTO	Pricing Cap To	Dates on which the price cap ends
PRICINGMODEL	Pricing Model	A description of the fee structure applicable to the product
PRINTCANCELNOTE	Print Cancellation Note	Additional information about specific cancellation restrictions for print versions of electronic titles covered by the license
PRINTCANCELRESTRICTION	Print Cancellation Restriction Indicator	Any restriction(s) on canceling print versions of electronic titles covered by a license
PRINTPURCHASEORDERNO	Print Purchase Order No	Pointer to an acquisition record in another system
PURCHASEORDERNO	Purchase Order Number	The number assigned to the purchase order of a product
RENEWCANCDATE	Purchase Renewal Date	The date on which the subscription expires if it is not renewed
RENEWCANCDESCISIONNOTE	Renew Cancellation Decision Note	The reason for canceling or renewing the subscription
RENEWCANCNOTEILS	Renew Cancellation Note ILS	Renew cancellation note to send to the ILS
RENEWCANCNOTEVENDOR	Renew Cancellation Note Vendor	Renew cancellation note to send to the vendor
SUBSCRIPTIONNOTIFICATION	Advanced notification	The number of days before the acquisition end date that an alert should be sent to acquisition staff to review the acquisition record.
SUBSCRIPTIONTYPE	Subscription Type	Subscription Type
SUBSCRIPTIONTYPENOTE	Subscription Type Note	Subscription Type Note
UPDATEDATE	Update date	Acquisitions update date
UPDATEDBY	Updated by	Verde User that updated the acquisition record.

Table 91. Acquisition Fields

Code	Data Element Name	Definition
VENDORCODE	Vendor Code	Vendor Code
VENDORSUBSCRIPTIONCODE	Vendor Subscription Code	The ID of the Vendor Subscription

License Fields

Table 92. License Fields

Code	Data Element Name	Definition
ACCESSABILITYCOMPLIANCE	Accessibility Compliance Indicator	An agreement that the data is provided in a form compliant with relevant accessibility (disabilities) legislation
ALLRIGHTSRESERVEDCODE	All Rights Reserved Indicator	A clause stating that all intellectual property rights not explicitly granted to the licensee are retained by the licensor
APPLICABLECOPYRIGHTLAW	Applicable Copyright Law	A clause that specifies the national copyright law agreed to in the contract
ARCHIVINGFORMATCODE	Archiving Format	The format of the archival content
ARCHIVINGNOTE	Archiving Note	Additional information related to archiving rights, product, and format
ARCHIVINGRIGHTSCODE	Archiving Right	The right to permanently retain an electronic copy of the licensed materials

Table 92. License Fields

Code	Data Element Name	Definition
CITATIONREQUIREMENTDETAILS	Citation Requirement Detail	A specification of the required or recommended form of citation
CLICKWRAPMODIFICATION	Click-wrap Modification Clause Indicator	A clause indicating that the negotiated agreement supersedes any click-through, click-wrap, other user agreement, or terms of use residing on the provider's server that might otherwise function as a contract of adhesion
COMPLETENESSOFCONTENTCODE	Completeness of Content Clause Indicator	The presence of a provision in the contract stating that the licensed electronic materials shall include all content found in the print equivalent
CONCURRENCYWITHPRINTCODE	Concurrency with Print Version Clause Indicator	The presence of a provision in the contract which states that the licensed materials is available before, or no later than the print equivalent, and/or is kept current
CONFDTYOFAGREEMENT	Confidentiality of Agreement	The presence or absence of clauses that specify or detail restrictions on the sharing of the terms of the license agreement
CONFDTYOFAGREEMENTNOTE	Confidentiality of Agreement Note	Specific details about what aspects of the license are private

Table 92. License Fields

Code	Data Element Name	Definition
CONFIDENTIALITYOFUSER	Confidentiality of User Information Indicator	The requirement that user data should not be shared with third parties, reused or resold without permission
CONTENTWARRENTY	Content Warranty	A clause that guarantees a remedy to the licensee if the quantity or quality of material contained within the resource is materially diminished.
COURSEPACKELECTRONICCODE	Course Pack Electronic	The right to use licensed materials in collections or compilations of materials assembled in an electronic format by faculty members for use by students in a class for purposes of instruction
COURSEPACKPRINTCODE	Course Pack Print	The right to use licensed materials in collections or compilations of materials assembled in a print format by faculty members for use by students in a class for purposes of instruction
COURSEPACKTERMNOTE	Course Pack Term Note	Information which qualifies a permissions statement on Course Packs
COURSERESERVEELCORCASHCODE	Course Reserve Electronic / Cached Copy	The right to make electronic copies of the licensed materials and store them on a secure network

Table 92. License Fields

Code	Data Element Name	Definition
COURSERESERVEPRINTCODE	Course Reserve Print	The right to make print copies of the licensed materials and place them in a controlled circulation area of the library for reserve reading in conjunction with specific courses of instruction
COURSERESERVETERMNOTE	Course Reserve Term Note	Information which qualifies a permissions statement on Course Reserves
CREATEDBY	Created By	Verde user
CREATEDDATE	Created Date	Date of creation
CUREPERIODFORBREACH	Cure Period for Breach	The cure period for an alleged material breach
CUREPERIODFORBREACHUOMCODE	Cure Period for Breach Unit of Measure	The time interval that measures the Cure Period for Breach
DBPROTECTIONOVERRIDECODE	Database Protection Override Clause Indicator	A clause that provides fair use protections within the context of assertions of database protection or additional proprietary rights related to database content not currently covered by U.S. copyright law
DELIVERYREQUIREMENTS	License Delivery Instructions	The required medium in which official communications must be delivered
DIGITALCOPYCODE	Digitally Copy	The right of the licensee and authorized users to download and digitally copy a reasonable portion of the licensed materials

Table 92. License Fields

Code	Data Element Name	Definition
DIGITALCOPYTERMNOTE	Digitally Copy Term Note	Information which qualifies a permissions statement on digital copy
DISTANCEEDUCATION	Distance Education	The right to use licensed materials in distance education
DISTANCEEDUCATIONTERMNOTE	Distance Education Term Note	Information which qualifies a permissions statement on distance education
ELECTRONICLINKCODE	Electronic Link	The right to link to the licensed material
ELECTRONICLINKTERMNOTE	Electronic Link Term Note	Information which qualifies a permissions statement on Electronic Links
ENDDATE	End Date	The end date of the license
EXECUTIONDATE	License execution date	Date on which the license was executed.
FAIRUSECLAUSECODE	Fair Use Clause Indicator	A clause that affirms statutory fair use rights under U.S. copyright law (17 USC Section 107), or that the agreement does not restrict or abrogate the rights of the licensee or its user community under copyright law
FILELOCATION	Electronic File Location	The path where electronic version of license is stored
GENERALTERMSNOTE	Terms Note	Notes about the terms in the business agreement of the license as a whole

Table 92. License Fields

Code	Data Element Name	Definition
GOVERNINGJURISDICTION	Governing Jurisdiction	The venue or jurisdiction to be used in the event of an alleged breach of the agreement
GOVERNINGLAW	Governing Law	A clause specifying the governing law to be used in the event of an alleged breach of the agreement
INDEMNIFICATION	Indemnification by Licensee Clause Indicator	A clause by which the licensee agrees to indemnify the licensor against a legal claim, usually for a breach of agreement by the licensee
INDEMNIFICATIONCODE	Indemnification by Licensor Clause	A clause by which the licensor agrees to indemnify the licensee against a legal claim
INTELLECTUALPROPWARRENTY	Intellectual Property Warranty Indicator	A clause in which the licensor warrants that making the licensed materials available does not infringe upon the intellectual property rights of any third parties
INTRLIBELECTRONICCODE	Interlibrary Loan Electronic	The right to provide the licensed materials via interlibrary loan by way of electronic copies
INTRLIBKEEPINGREQUIREDCODE	Interlibrary Loan Record Keeping Required Indicator	The requirement to keep records of interlibrary loan activity and provide reports to the licensor at periodic intervals or upon request

Table 92. License Fields

Code	Data Element Name	Definition
INTRLIBPRINTORFAXCODE	Interlibrary Loan Print Or Fax	The right to provide the licensed materials via interlibrary loan by way of print copies or facsimile transmission
INTRLIBSECURETRANSCODE	Interlibrary Loan Secure Electronic Transmission	The right to provide the licensed materials via interlibrary loan by way of secure electronic transmission
INTRLIBTERMNOTE	Interlibrary Loan Term Note	Additional information related to interlibrary loan
LICENSEDURATION	License Duration	The period of time covered by the license agreement – a number
LICENSEDURATIONVAL	License Duration Value	The period of time covered by the license agreement – a value – for example, year
LICENSEE	Licensee	■ One to whom a license is granted ■ The legal party who signs or otherwise assents to the license
LICENSEENOTICEPERIODOFTRMN	Licensee Notice Period for Termination Unit of Measure	The time interval in which the Licensee Notice Period for Termination by the library is measured
LICENSEENOTICEPERIODOFTRMNCODE	Licensee Notice Period for Termination	The amount of advance notice required prior to contract termination by the Licensee
LICENSEETERMINATIONRIGHTS	Licensee Termination Right Indicator	The ability of the licensee to terminate an acquisition during a contract period

Table 92. License Fields

Code	Data Element Name	Definition
LICENSEETRMNCONDITIONCODE	Licensee Termination Condition	The conditions that would allow a licensee to terminate acquisition during a contract period
LICENSENAME	License Name	The locally-assigned name of the license agreement
LICENSEURI	License Uniform Resource Identifier	The URI at which the license agreement is made available
LICENSEURITYPE	License Uniform Resource Identifier Type	The type of URI being used to locate the license agreement
LICENSINGAGENT	Licensing Agent	An organization (such as a subscription agent) or an individual that facilitates a licensing transaction on behalf of one or more parties
LICENSINGNOTE	Licensing Note	Additional information regarding the license, the negotiation of the license, the product, and so on.
LICENSOR	Licensor	■ One who grants a license to another ■ The party who formulates the terms and conditions of use for the product with whom the licensee (purchaser) is bound in contract by signing or otherwise assenting to a license agreement
LICENSORNOTICEPERIODTRM	Licensor Notice Period for Termination	The amount of advance notice required prior to contract termination by the licensor

Table 92. License Fields

Code	Data Element Name	Definition
LICENSORNOTICEPERIODTRMCODE	Licensor Notice Period for Termination Unit of Measure	The time interval in which the Licensor Notice Period for Termination is measured
LICENSORTERMINATIONRIGHTS	Licensor Termination Right Indicator	The ability of a Licensor to terminate an acquisition during a contract period
LICENSORTRMCONDITION	Licensor Termination Condition	The conditions that would allow a Licensor to terminate an acquisition during a contract period
LINKEDLICENSENOTE	Linking Note	Additional information about linking
LOCALLICENSENEGOTIATOR	Local License Negotiator	The name of the local person responsible for negotiating the license
LOCALSUTHORIZESUSERDEF	Local Authorized User Definition Indicator	The inclusion of an institution-specific preferred authorized user definition
LOCALUSEPERMISSION	Local Use Permission	Local use note
MAINTENACEWINDOW	Maintenance Window	The recurring period of time reserved by the product provider for technical maintenance activities, during which online access may be unavailable
METHODCODE	Method Code	License method
NONRENEWALNOTICECODE	Non-Renewal Notice Period Unit of Measure	The time interval in which the Non-Renewal Notice Period is measured

Table 92. License Fields

Code	Data Element Name	Definition
NONRENEWALNOTICEPERIOD	Non-Renewal Notice Period	The amount of advance notice required prior to license renewal if the licensee does not wish to renew the subscription
ORIGINALLICENSOR	Original Licensor	The original organization granting the license
PERFORMANCEWARRENTYIND	Performance Warranty Indicator	Indicates whether a clause that requires a satisfactory level of online availability and/or response time is present
PERPETUALACCESSFROM	Perpetual Access From	The date from which there is perpetual access
PERPETUALACCESSRIGHTS	Perpetual Access Right	The right to permanently access the licensed materials paid for during the period of the license agreement
PERPETUALACCESSTO	Perpetual Access To	The date to which there is perpetual access
PERPETUALHOLDINGSNOTE	Perpetual Holdings Note	Note about perpetual holdings
PHYSICALLOCATION	Physical License Location	The place where a printed or other tangible instance of the license is stored
PRINTCOPY	Print Copy	The right of the licensee and authorized users to print a portion of the licensed materials
PRINTCOPYTERMNOTE	Print Copy Term Note	Information which qualifies a permissions statement on Print Copy

Table 92. License Fields

Code	Data Element Name	Definition
PUBLICNOTE	Public Note	Additional information regarding the resource that is intended for public use
REMOTEACCESSCODE	Remote Access	The right of an authorized user to gain access to an Electronic Product from an offsite location
RENEWALDATE	Renewal Date	Date of renewal
RENEWALTYPECODE	Renewal Type	A clause which specifies whether renewal is automatic or explicit
REPLACEDBY	Replaced By	License code of later license
REPLACES	Replaces	License code of earlier license
SCHOLARYSHARING	Scholarly Sharing	The right of authorized users and/or the licensee to transmit hard copy or an electronic copy of a portion of the licensed materials to a third party for personal, scholarly, educational, scientific or professional use
SCHOLARYSHARINGNOTE	Scholarly Sharing Term Note	Information which qualifies a permissions statement on Scholarly Sharing
STARTDATE	Start Date	The start date of the license

Table 92. License Fields

Code	Data Element Name	Definition
STATUSCODE	License status	Status of the license. Default values are: 'New' ,'In negotiation' ,'Under review', 'Under local review', 'Pending local response' ,'Pending licensor response', 'Awaiting vendor generic license', 'Redacted version created', 'Electronic version created' , 'Awaiting local signature', 'Final legal version received' , 'Approved' , 'Pending final local signature', 'Retired', 'Pending final signature by licensor' , 'Approved locally' , 'Rejected' . Can be customized by changing the value in the code table
STATUSNOTE	License status note	Note field that contains additional information regarding the license status.
TRMREQUIREMENTNOTE	Termination Requirements Note	A clarification of the termination requirements and what certification of the requirement activities is necessary
TRMRIGHTNOTE	Termination Right Note	Additional information necessary to amplify any specifications of termination rights

Table 92. License Fields

Code	Data Element Name	Definition
TYPECODE	License type	Type of license. Once defined cannot be modified. Default values are: 'Regular', 'Trial', 'Supplemental', 'Prevailing'. Can be customized by changing the value in the code table.
UCITAOVERRIDE	UCITA Override Clause Indicator	A clause that reflects the licensor's agreement to use U.S. state contract law in the event UCITA is ever passed and implemented in the specified governing law state
UPDATEDATE	Update Date	Date record updated
UPDATEDBY	Updated By	Verde user
USERESTRICTIONSNOTE	Use Restriction Note	Use Restriction Note
VENDORADVANCEDNOTICE	Vendor Advanced Notice	The amount of time before the license expires that you need to cancel your subscription. A number
VENDORADVANCEDNOTICEVAL	Vendor Advanced Notice Value	The amount of time before the license expires that you need to cancel your subscription. A value
WORKINTERMUSENOTE	Walk-in term use note	